OLIS

Circulation User Manual

A Guide for staff

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1996, updated 1999

OLIS Circulation User Manual

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Great Escapes

moving around OLIS

Using the option bar

e.g.

Addresses	**Forward**	**Backward**	**Second screen**	**Update barcode**
Notes	**Added borrowers**		**File**	**Exit**

Move the cursor to highlight the option you wish to use and press <Return> to activate it.
Move the cursor using the arrow keys ← or ↑ or → or ↓ OR type the first letter of the option, e.g.
b = Backward **s** = Second screen **u** = Update barcode **n** = Notes **e** = Exit

BUT

Be careful where two options have the same initial letter, i.e.,
a (once) = Addresses **a** (twice) = Added borrowers
f (once) = Forward **f** (twice) = File

Common options

# Line	**Line by line**	**Exit**	**File**	**Accept**

 # Line Access a line. Select this option, type the line number and press **<Return>**.

Line by line Use this option to access each line in a screen in turn. Press **<Return>** to move through the fields and finally return to the option bar. If you wish to leave a field half way down the screen in this mode, press the **Spacebar** once and then **<Return>** to get back down to the option bar and file or exit.

Always select* File *or* Accept** and press **<Return>** ***to leave a screen and save your changes.

Select **Exit** and **<Return>** to leave the screen only if you have made no changes you want to keep or there is no alternative.

From within a field

?? <Return> takes you to a list of options behind a field

. <Return> takes you back up a line to rectify an error

 # <Return> deletes data in the whole field to leave it blank

<Space> <Return> takes you back to the option bar

<Ctrl/H> Backspace/Delete (where backspace/delete key does not work)

<Esc> (pause) **<e>** exit a window

<Esc> (pause) **<l>** go to the end of the line

<Esc> (pause) **<o>** insert characters - **<Esc><o>** again reverts to overtype mode

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Borrower Registration

Introduction

This chapter sets out guidelines for the creation of borrower records on OLIS. Borrower records include some system-wide borrower information and some local library data. For this reason, borrower registration is a two part process for OLIS circulation libraries:

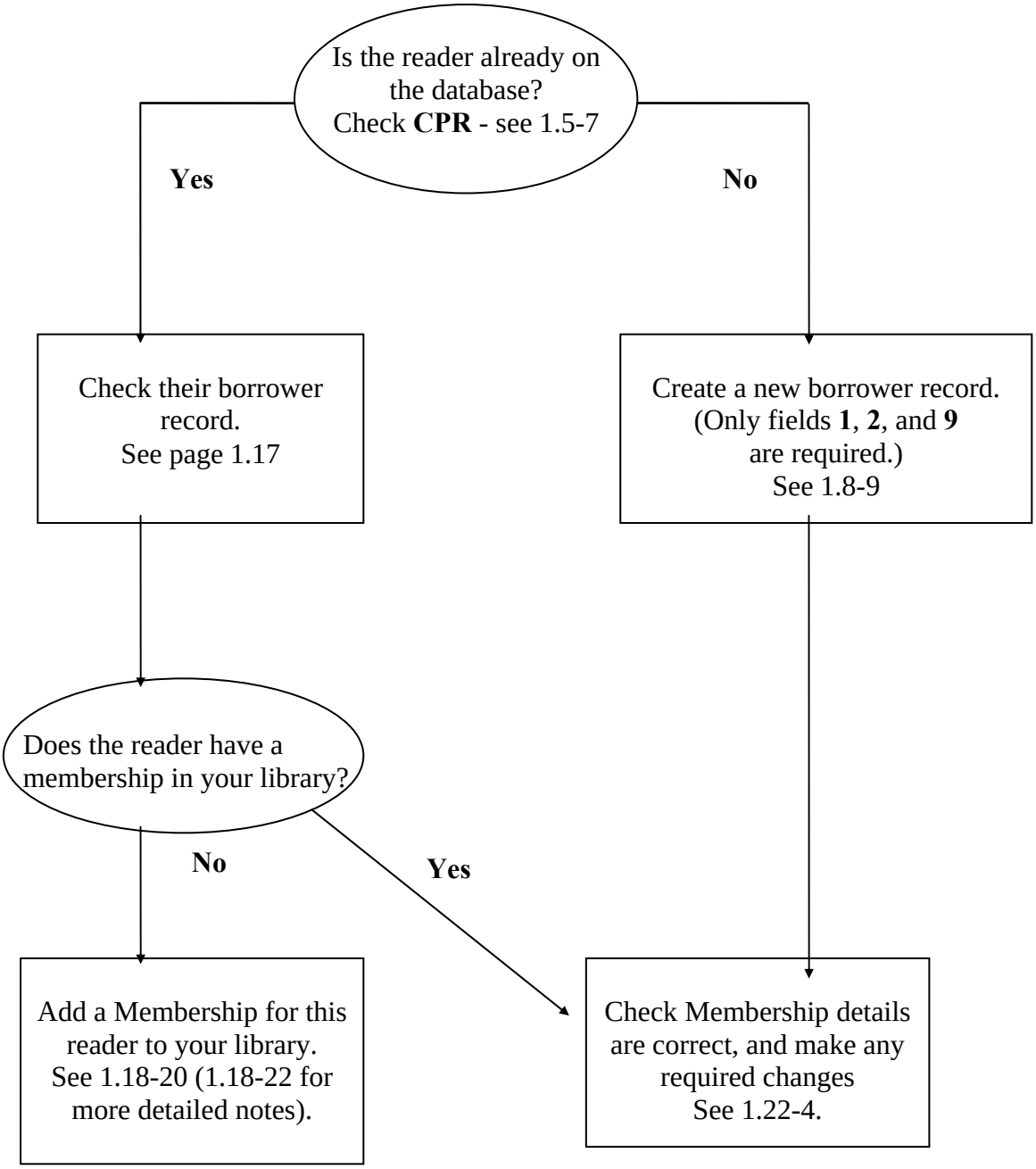
First: **Registration of the borrower on the OLIS database.** This will usually happen centrally through the downloading of records from the University card database, though manual registration may be necessary in some cases. This core record can be used by all OLIS circulation libraries, though to enable a reader to borrow in a particular library, the reader must also be given a local membership. This guide shows the procedure for manual registration where this would be necessary.

Second: **Creation of memberships in each circulating library from which the reader will be allowed to borrow**. This chapter shows how to add a membership to the borrower record to enable him or her to borrow items from your local library. Until the reader has such a membership in your library, you will be unable to update any of the details in their borrower record on OLIS.

In this chapter guidelines for these two procedures for registration and membership creation are outlined first, followed by a more detailed description of optional facilities which may be useful in borrower registration.

The process of updating and amending the borrower record will be described in Chapter 2: Updating the Borrower Record and Keeping Track of the Borrower.

Borrower Registration and Membership at a glance


Is the reader already on the database?
Check **CPR** - see 1.5-7
Yes
No
Check their borrower record.
See page 1.17
Create a new borrower record. (Only fields **1**, **2**, and **9** are required.)
See 1.8-9
Does the reader have a membership in your library?
No
Yes
Add a Membership for this reader to your library.
See 1.18-20 (1.18-22 for more detailed notes).
Check Membership details are correct, and make any required changes
See 1.22-4.

Registration

Avoiding Duplicates

Before registering a new borrower, it is essential to check that the reader is not already present on the system. Even if you cannot find an entry for the reader under their current card or barcode number, be careful to avoid duplicate registrations, as these create confusion and unnecessary work, and can create a security risk (in the event of cards being lost). Enquire whether the reader is already registered at any OLIS library in Oxford or has an old library card number, and request any names under which the reader may be known in the Oxford system, and also use the OLIS circulation patron file to check against duplication. If the reader is already on the database but with an old reader barcode number, do **not** create a new registration for them, but use the Update barcode function (see below 2.18-9) to update their existing registration.

You should be aware of the existence of some library-specific cards in Oxford which some libraries (such as Continuing Education, the Taylor and Taylor Slavonic Libraries, and the Maison Française) issue in order to allow readers not entitled to University cards to borrow there. It is also possible for libraries **at their discretion** to add readers who do not have university cards to the OLIS circulation patron file, using a seven-digit reader number from barcodes which can be supplied by LAS on request. **Very occasionally** either type of reader may subsequently obtain a University card. If you wish to give such a reader permission to borrow from your library, you should **not** create a new registration for them, as they will already be registered in OLIS with a barcode number. You should instead use the Update barcode function (see below 2.18-9) to update the reader's barcode to the number on their University card. In such circumstances we strongly advise that the reader's library-specific card is no longer used, even in its library of origin. If such a reader's record is updated in this fashion, it would thus be ideal if the librarian could warn the reader that they should in future use their University card to borrow in every Oxford library which uses OLIS circulation of which they are a member. Consultation of fields 12 and 13 in the second screen of CPR (see below 1.26) may occasionally assist the librarian in the process of borrower registration in identifying whether a reader's current barcode number on OLIS is a University card number.

If on the other hand you work in a library which issues library-specific cards, **very occasionally**, you may wish to give borrowing permissions to a reader who does not have a University card, but does have a library-specific card from another library. In this case, you should avoid a duplicate registration by using the card and number provided by the other library.

If you find duplicate patron records in the OLIS patron file, or if you create any by accident, please report them to LAS where they can be corrected.

Registering a new Borrower

Step 1

Select the patron registration screen by selecting the option for or typing **CPR** and pressing <**Return**> at any menu in the circulation module. The following prompt will appear:

```
Enter Patron Name or Barcode:
```

Step 2

Wand in the barcode number of any University card or card provided by another library or type in this number (first seven digits, excluding any final letter or check digit) and press **<Return>**, or alternatively type in the reader's name (in the format **peatling**, **peatling, g**, or **peatling, gary**) and press **<Return>**.

If you enter a barcode number, if there is an exact match you will be taken straight to the patron registration screen of the borrower. If there is no match, the following message will display:

```
The record 2xxxxxx is missing from the PATRON file :
Do you want to create a new record (Y/N)?
```

Please type **N** and press **<Return>** and check that the reader is not registered under a different number (by searching using the reader's name) before you create a new registration.

If you type in a borrower name, a list of existing borrowers similar to the following will appear:

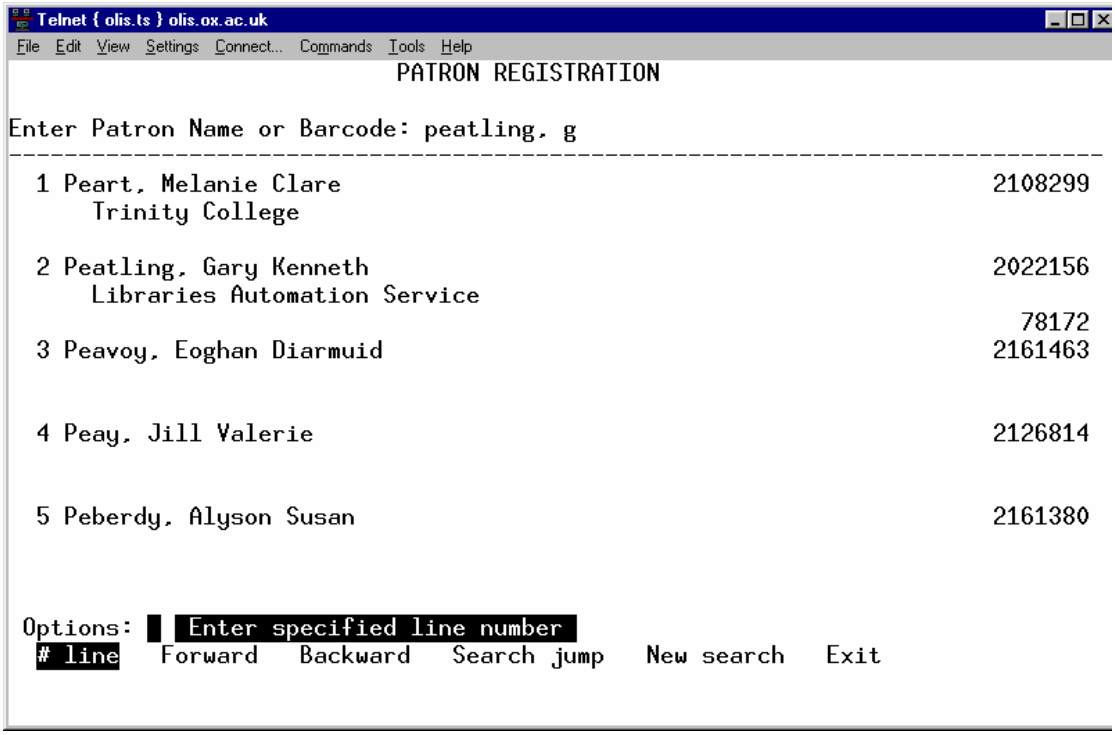

Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
PATRON REGISTRATION
Enter Patron Name or Barcode: peatling, g
1 Peart, Melanie Clare 2108299
Trinity College
2 Peatling, Gary Kenneth 2022156
Libraries Automation Service
78172
3 Peavoy, Eoghan Diarmuid 2161463
4 Peay, Jill Valerie 2126814
5 Peberdy, Alyson Susan 2161380
Options:
Enter specified line number
line Forward Backward Search jump New search Exit

Fig. 1.1: Borrower browse list

The list will display the closest alphabetical matches to the surname you have entered on lines 1-2. If you mistype, or for any reason a different part of this alphabetical list of readers displays, it is possible to browse up or down the list by selecting the **Forward** or **Backward** options and pressing **<Return>**, or to enter a new search term by selecting the **Search Jump** or **New Search** options and pressing **<Return>**.

Ð Tip

Remember to try alternative spellings and be cautious of the order used in foreign names.
For example,

Bains and Baynes; Smith and Smyth,

The Chinese name Duan Xiaoming starts with the family name and in Western style would be Mr. Xiaoming Duan. The surname should be under "D" but could have been incorrectly entered, so try "X" too, just in case.

Muslim names, e.g., Aamir Ali Khan, will almost certainly be entered with the final name as the surname, but it will be worth checking using the first name as well.

Step 3

If you find the reader on the database under a former card number, please use the Update barcode function to update their barcode number on OLIS to the number of the current card (see below 2.18-9): Note that in such a case the reader will need to have a membership in your library before it will be possible for you to update the barcode, so you will need to give them a membership on their old barcode number before you can update the barcode. If however you establish that it is appropriate to create a new registration for the reader, select the option for **New Search** and press **<Return>**. The following prompt will re-appear:

```
Enter Patron Name or Barcode:
```

Step 4

Either wand in the new barcode from the reader's University (or other) card, or from your library's supply from LAS, or type it in and press **<Return>**. This must always be an official barcode number (i.e. a seven-digit number beginning with the number 2 and obtained from LAS).

The following message will reappear:

```
The record 2xxxxxx is missing from the PATRON file :
Do you want to create a new record (Y/N)? __
```

Type **Y** and press **<Return>** to confirm that you wish to register the new reader. The system displays a blank patron registration screen (See Fig. 1.2 on page 1.10)

Answering **N** returns you to the initial patron registration prompt.

*NB: It is possible to create a new borrower record for a reader without a barcode, although as you will not be able to issue items to such a reader until they have obtained a university or other card or are assigned a barcode, it is rare that this will be necessary. To access this function, type **N** and press **<Return>** at the prompt:

Enter Patron Name or Barcode:

The system will automatically assign a negative borrower number to the new record. This number can be changed later by the use of the **Update Barcode** option (see 2.18-9 for detailed guidelines on this procedure). In *most* cases, a new borrower will have a university or other card number which should be used at this point.

Step 5

Filling in the Registration Screen

Either follow the Brief Guide to Registration below (1.8-9) or type **L** and press **<Return>** for the **Line by Line** option of entering data and work through the screen using the detailed notes on 1.9-16 for guidance.

Brief Guide to Registration

These are the minimum entries required to register a new borrower:

Step 1

The cursor will default to the **# line** option on the option bar at the bottom of the screen. Choose field 1 by typing **1** and pressing **<Return>**. Field 1 is for the borrower *Name* which is a **required** field. Type in the family name first, followed by a comma. Then enter the first name and middle names (if known). E.g. **Neate, Geoff P** and press **<Return>**.

Step 2

Choose field 2 by typing **2** and pressing **<Return>**. Field 2 is for the borrower first address and is a **required** field. An editing window will appear. Enter an address here. This field will usually be labelled 'College'. If you find that you frequently wish to enter a different type of address (e.g., departmental address) when registering readers in order to use when sending circulation notices, it is possible to change this default (see Circulation Set Up Manual, 7.4-5). Three lines may be used for the address, but only two will be displayed on the first borrower registration screen. Please note that we do not advise that you enter town or city names or postcodes in this address field if you know the address postcode - these should then be entered as part of a postcode record (see below 1.11-2). Use **<Esc> <e>** (i.e., press the **Escape** key and then type **e**) or press **<Return>** several times to exit the window.

Step 3

Choose field 9 by typing **9** and pressing **<Return>**. Field 9 designates the borrower type in respect of reservations and is a **required** field. Type in the required code if you know it and press **<Return>**, or enter **??** and press **<Return>** to see the list of options behind this field. There are currently two applicable options - RES999 (Reader with unlimited reserves) and RESNON (Reader with no reserves). The appropriate option will usually be RES999 as otherwise the reader will be unable to place reservations against the holdings of any library using OLIS circulation; it is possible to prevent a group of readers from placing remote reservations against the holdings of your particular library elsewhere on the system (see Circulation Set Up Manual, 7.25-6). Type **1** and press **<Return>** to select the code RES999 from the list.

Step 4

The system will prompt you for a Membership code. Type in the required code if you know it and press **<Return>**, or type **??** to see the list of patron membership codes behind this field. To go to the part of this index listing the patron membership codes for your library, you should then select the option **Search Jump** and press **<Return>**, type in your library's three-letter code *in upper case,* and then press **<Return>** again. Your choice of code will depend on your library's policy towards different borrowers; the codes have descriptions attached to help you identify the appropriate borrower group. Type in the line number of the patron membership you wish to use and press **<Return>**. [NB: Do not rely on memorising such list numbers as they may change as more codes are added.]

Step 5

To save your changes and create the new borrower record, you **must** select the **File** option and press **<Return>**.

Entries in fields **1, 2, and 9 (name, first address, and patron and membership codes)** are required before you save a new borrower record. If you try to save a new record, having not completed any required field(s), the following message appears:

An entry is required at the xxx field

The Borrower Record line by line

There are other optional fields which you may wish to complete before saving this record to enable further use of the functions of OLIS circulation at your library in connection with this patron. The most likely are fields 14 for password, and field 18 for standard contact method. The following section describes the function of each field in turn in the borrower record fields.

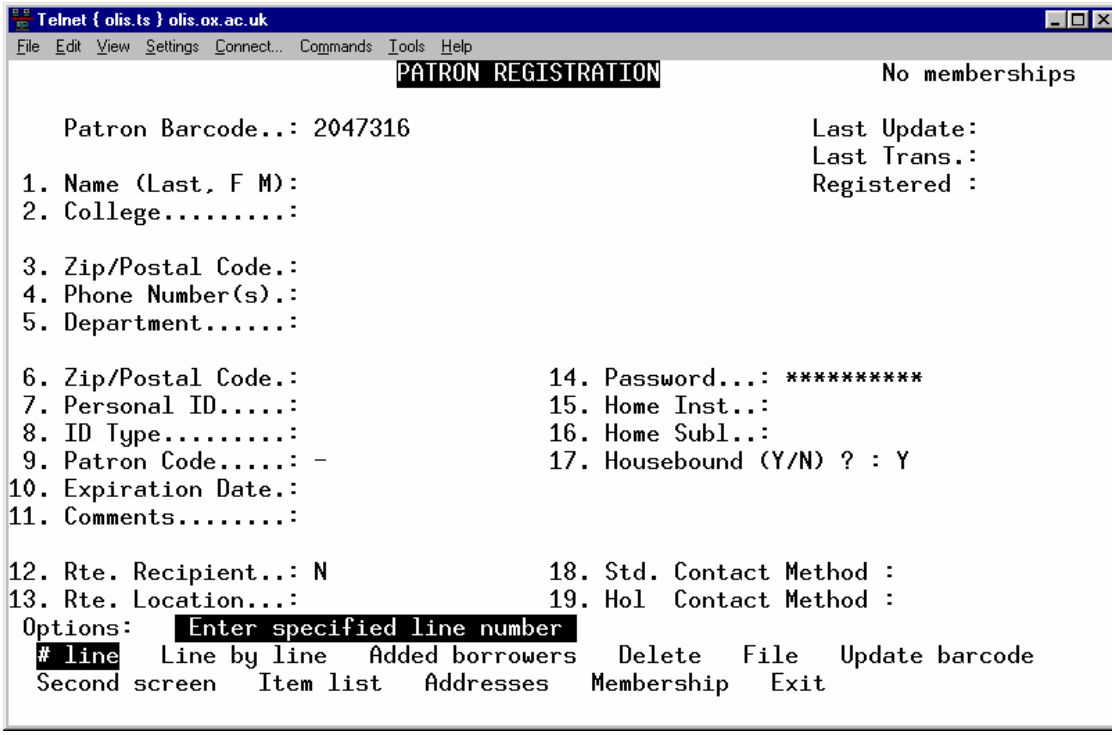


Fig. 1.2: Blank Borrower record

The fields without numbers at the top of the screen will mostly appear blank before a patron is first registered, but will thereafter contain information generated in the registration process, or generated by other transactions on the system.

Membership

The message *No memberships* will appear in the top right corner of a new record. After a patron membership code for your library has been linked to this record, this code will display here.

Patron Barcode

Contains the barcode which is attached to this borrower record. A negative system-assigned number will appear here if a real barcode number was not used in registering the reader. Use the **Update Barcode** option to assign a real barcode (See 2.18-9).

Old Barcode

This field will appear only if the **Update Barcode** option has been used in this record. Any previous barcode number(s) associated with this reader will be displayed here. Either (a) real barcode number(s) (e.g., from lost cards) or (a) system-assigned negative number(s) may appear here.

Last Update

Contains the date of the most recent changes to the borrower's patron record in your library.

Last Transaction

Contains the date of the reader's most recent transaction(s) in your library. A transaction could be an item checked in or out, or a fine payment.

Registered Indicates the date the borrower was first given a membership in your library.

Information may be entered in the numbered fields, either by automatic downloading (from the University card database) or manual input. Where you wish manually to input data, you may select the **#line** option, type a field number and press **<Return>** to access that particular field, and press **<Return>** when you have typed in the required data to go back to the option bar. Alternatively you may select the **Line by line** option and press **<Return>** to go through each of the 19 fields in turn, entering data as required.

1. Name ***Required.*** Enter the reader's last name, followed by a comma. Then enter any known first and middle names. E.g. **Neate, Geoff P.**

2. (First address) ***Required.*** An editing window will appear. Enter an address here. This field will usually be labelled 'College'. If you find that you frequently wish to enter a different type of address (e.g., departmental address) when registering readers in order to use when sending circulation notices, it is possible to change this default (see Circulation Set Up Manual, 7.4-5). Three lines may be used for the address, but only two will be displayed on the first borrower registration screen. Please note that we do not advise that you enter town or city names or postcodes in this address field if you know the address postcode - these should then be entered as part of a post code record in the next field. Use **<Esc> <e>** (i.e., press the **Escape** key and type **e**) or press **<Return>** several times to exit the window.

3. Postal Code *Optional.* Allows you to enter a postal code. When completed, the system will display any further address details stored in OLIS associated with the postcode. Please note that we advise that you enter the postcode and town/city name here as part of a postcode record, as this will produce a more consistent display on printed notices.

Creating a Postcode Record

Step 1

Type the postcode in field 3 and press **<Return>**. If the system already has a record of this postcode, as it will in the case of many Oxford postcodes, town/city details will automatically appear in field 3, and there is no need to create a new postcode record: please proceed with completing any other fields of the Patron Registration screen that you wish to complete.

If there is *not* already a record for the postcode on OLIS a *City - State/Province - Zip/Postal Code Edit* screen will appear with the message:

```
*** Record not found for XXX XXX
    Do you want to create a new record (Y/N)?
```

Step 2

Type **y** and press **<Return>** and the cursor will appear at the *City:* prompt. Here you may enter town/city details which will be stored on OLIS and retrieved if the postcode is used again in registering other borrowers (if you do not wish to create such a record, it is possible to type **n** and press **<Return>** at the above prompt to exit this screen). If you are entering an Oxford postcode, type **oxford** here and press **<Return>** three times (no data is needed in fields 2 and 3) - if you are entering a postcode from elsewhere, you may wish to enter further details in fields two or three. The system will automatically adjust the city name to upper case.

Step 3

The cursor will go down to the option bar. Select **File** and press **<Return>** to save your changes and go back to the *Patron Registration* screen.

*NB: It is also possible to select **# line**, type a line number, and press **<Return>** at this point if you wish to edit any field in the postcode record. Selecting **Exit** and pressing **<Return>** will also take you back to the *Patron Registration* screen, but will not save the new record for the postcode you have entered.

4. Phone Number

Optional. Enter the borrower's telephone number. For example, **278172**. This may be any number with five digits or more. For Oxford numbers enter the six-digit number; for external numbers simply prefix the number with the area code. Do NOT use spaces, hyphens or brackets in this field. Multiple phone numbers should be separated by commas.

5. (Second address)

Optional. When you enter this field, an editing window will appear. This field is usually labelled 'Department'. Enter a departmental address here if known. If you find that you frequently wish to enter a different type of address (e.g., vacation home address) in this screen in order occasionally to use when sending circulation notices to readers, it is possible to change the default type of address for which you will be prompted (see Circulation Set Up Manual, 7.4-5). Three lines may be used for the address, but only two will be displayed on the first borrower registration screen. Please note that we do not advise that you enter town or city names or postcodes in this address field if you know the address postcode - these should then be entered as part of a postcode record in the next field. Use **<Esc> <e>** (i.e., press the **Escape** key and type **e**) or press **<Return>** several times to exit the window.

6. Postal Code

Optional. A postcode for the borrower's second address (entered in field 5) can be entered here. A new postcode record can be created if the postcode has not already been stored on the system (see above 1.11-2).

7. Personal ID

Optional. A personal ID number (including letters) unique to the borrower, such as a national insurance number, may be entered here. Such a number could be used to *retrieve this borrower* at the "Enter Borrower Name or Barcode:" prompt, if entered preceded by ID=. However as a borrower's name or barcode number is more commonly used to retrieve their record, it should *very rarely* be necessary to use fields 7 and 8 in this screen.

8. ID type

Optional. Enter a description here of the type of any ID entered in the Personal ID field. For example, if you have entered a national insurance number in field 7, you could enter **NI** here.

9. Patron code

Required. Use to designate the borrower type in respect of reservations. Type in the required type if you know it and press **<Return>**, or type **??** and press **<Return>** to see the list of options behind this field. There are currently two applicable options - RES999 (Reader with unlimited reserves) and RESNON (Reader with no reserves). The appropriate option will usually be RES999 as otherwise the reader will be unable to place reservations against the holdings of any library using OLIS circulation; it is possible to prevent a group of readers from placing remote reservations against the holdings of your particular library elsewhere on the system (see Circulation Set Up Manual, 7.25-6). To select the option RES999 from this list, type **1** and press **<Return>**.

The system will prompt you for a Membership code at this point if the reader does not already have one in this library. Type in the required code if you know it and press **<Return>**, or type **??** to see the list of patron membership codes behind this field. To go to the part of this index listing the patron membership codes for your library, you should then select the option **Search Jump** and press **<Return>**, type in your library's three-letter code *in upper case*, and then press **<Return>** again. Your choice of code will depend on your library's policy towards different borrowers; the codes have descriptions attached to help you identify the appropriate borrower group. Type in the line number of the patron membership you wish to use and press **<Return>**. [NB: Do not rely on memorising such list numbers as they may change as more codes are added.]

10. Expiration Date

System assigned (but may be edited). The reader's membership (i.e., borrowing rights) in your library will expire on the date entered here. A date calculated from the parameters set up for each borrower group will automatically appear in this field when you

assign a patron membership code to this reader. You may press **<Return>** to accept this default or edit this system-assigned expiry date at this point by overwriting it. (The formats DD/MM/YY, DD-MM-YY, DD.MM.YY, etc., as well as formats including four digits for the year, will all be accepted, though any date you enter will be displayed in the format 31 DEC 2000.) The default expiry date for each patron membership code can be controlled in the circulation set up tables for your library (see Circulation Set Up Manual, 7.12-3, 21).

11. Comments

Optional. Notes can be entered here about a borrower record. Please note that this field is limited in space and will be visible both to the reader and to staff in other OLIS circulation libraries. (You are advised to consult 2.7-12 for more information about the various notes fields available before entering data in this field).

12. Rte. Recipient

Not used in Oxford. Please ignore.

13. Rte. Location

Not used in Oxford. Please ignore.

14. Password

Required to enable reader to use the OLIS patron functions (see the OLIS Reader Pocket Reference Guide 3 at http://www.lib.ox.ac.uk/olis/rpr3/index.htm for information about these functions). When a borrower record is uploaded from the university card database, the reader's password will automatically become the seven digits of their university card number. If however you are manually adding a new borrower into the patron file, you will also need to add this password manually. You are therefore advised in such cases to enter the seven digits of the reader's university or other card number in this field when creating a new borrower registration. As this is a system-wide practice, this will enable informed staff at other libraries, including non-circulating libraries, to help readers with any enquiries they might have about the patron functions. However, readers should be encouraged, for security reasons, subsequently to change their password from this default themselves.

Note that for security reasons a row of crosses will display before, after and as you type in the reader's password. An entered password will still be effective, **as long as** you remember to save your changes by selecting the **File** option when leaving the patron registration screen having typed in the password.

15. Home Inst.

Not used in Oxford. Please leave blank.

16. Home Subl. Not used in Oxford. Please leave blank.

17. Housebound (Y/N) *Required if the library wishes to keep a borrower history*. The default here is set to Y for yes. This will enable OLIS to retain a record of all the materials borrowed by the reader in your library which staff will be able to access (see 2.20-3). You are advised therefore *not* to change this setting.

If you go into this field the Patron registration (Housebound Patron) screen will display. This screen itself is not used in Oxford, so simply select the **Exit** option and press **<Return>**.

18. Std. Contact Method *Optional*. Fields 18 and 19 can be used to specify contact methods to be used when generating circulation notices for individual readers. These fields can be left blank as the system will then pick up any default entry for the entire patron membership (see Circulation Set Up Manual, 7.15-9, 23). However, you should enter a contact method in field 18 if you wish to use a contact method other than that default entry in the case of this individual reader. Type in the required code if you know it and press **<Return>**, or type **??** and press **<Return>** to see a list of the available contact method options. (These options are explained in Circulation Set Up Manual, 7.16-8.) You should **not** enter an option including a number unless an address is entered in the corresponding field of the reader's **Addresses** screen (see below 1.28-30). If you wish to send all of an individual reader's circulation notices by email, enter the appropriate contact method in this field (you will probably find **E** the most convenient contact method to use for email). Please note that there are further preconditions for use of the emailing of notices in your library - please consult the emailing of notices documentation (Circulation Set Up Manual, appendix I) if your library is considering starting to use this feature.

19. Hol Contact Method *Optional*. It is possible to specify vacation or other exceptional dates in the table CIHP when you may wish notices to be generated for individual readers or patron membership groups using a contact method other than that used for them at other times (see Circulation Set Up Manual, 7.28-35). If this has been done for your library, this field can be used for such periods as field 18 is for ordinary periods, i.e., to override any default contact method set for the patron membership group in the case of an individual reader. (Please note that field 19 is currently almost always left blank by libraries.) Please do **not** use a contact method option including a number unless an appropriate address for the reader is entered in the corresponding field of their **Addresses** screen (see below 1.28-30). If you wish to send all of an individual reader's circulation notices by email during such an exceptional contact period, enter

the appropriate contact method in field 19 (you will probably find **E** the most convenient contact method to use for email). Please note that there are further preconditions for use of the emailing of notices in your library - please consult the emailing of notices documentation (Circulation Set Up Manual, appendix I) if your library is considering starting to use this feature.

When you have finished creating the new borrower registration, it is **essential** to save your changes: select the **File** option and press **<Return>** to do this.

The Completed Screen

Depending a little which fields you have decided to use, a completed patron registration screen would probably look like this.

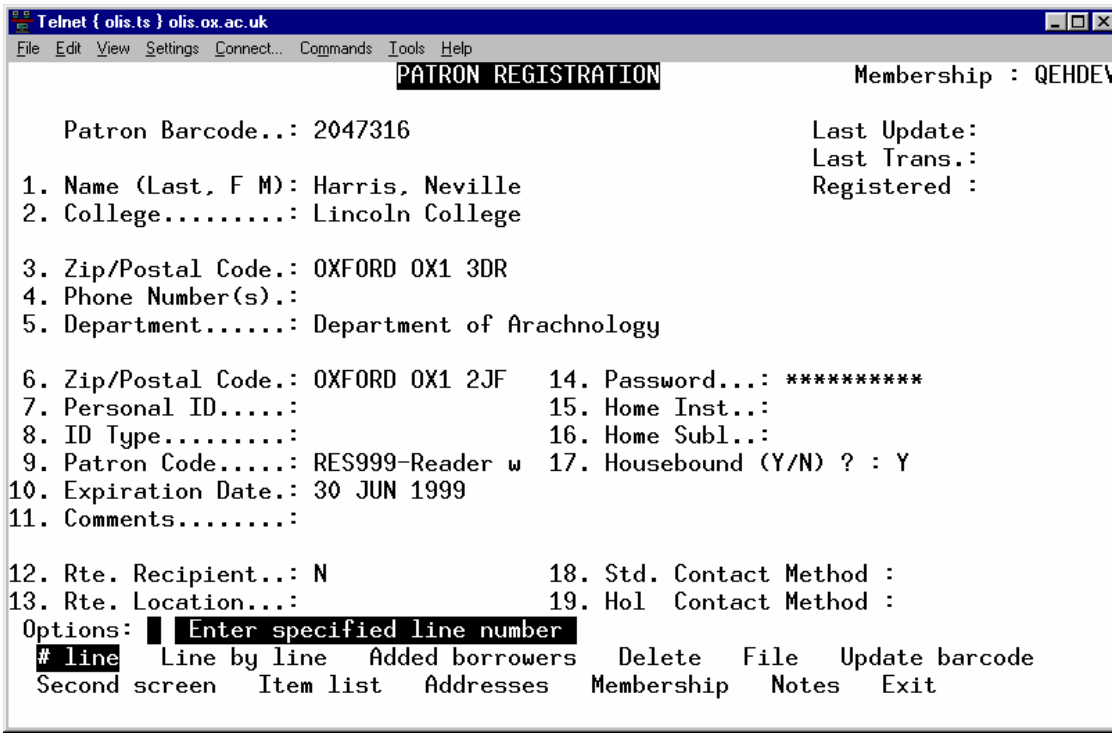


Fig. 1.3: Completed Borrower Registration screen

The registration process may be continued using certain options from the option bar at the bottom of the screen which are described further on in this chapter.

Deleting Readers

If you wish to prevent a reader from borrowing in your library, you do not need to delete the entire registration, but just their membership in your library. Please consult the guidelines in Circulation Set Up Manual, appendix H.8-11

If for any reason you need or wish to delete an entire borrower registration, please consult the guidelines on pages 2.19-20.

Membership

A reader in Oxford who is registered on the University card database will be registered on the OLIS database as soon as the University card details are uploaded. However, there will be no membership details for your library in place until that reader comes into your library to register their membership. Until the reader is given a membership in your library, they will be unable to borrow there through OLIS circulation, and you will be unable to edit any of the details in their borrower record. First library staff must check that the borrower is registered on OLIS and then create a membership, as outlined below:

Checking the Borrower Registration Record

Step 1

Access the patron registration screen by typing or selecting the option for **CPR** at any menu in the circulation module. The following prompt will appear:

Enter Patron Name or Barcode:

Step 2

Wand in the reader's barcode, or type in their name (in the format *surname, forename*) and press **<Return>**. The system will either go directly to the borrower record (if a barcode is entered) or to a borrower browse list (if a name was entered). In the latter case, if there is a registration for the current borrower, type in the line number and press **<Return>**. The message:

Please check membership code(s) - none present.

will appear if the reader currently has permissions to borrow in no OLIS circulation library. Press **<Return>** and the first Patron Registration screen will appear. If this borrower does not have permissions to borrow at your library but has permissions at other OLIS circulation libraries the message *No Local Membership* will appear in the top right hand corner of the screen. If they do not have a membership at any OLIS circulation library, the message *No Memberships* will appear here. If you are sure that you cannot find a record for the borrower at all in the OLIS patron file, it will be necessary to create a new one at this point (see 1.8-16 above).

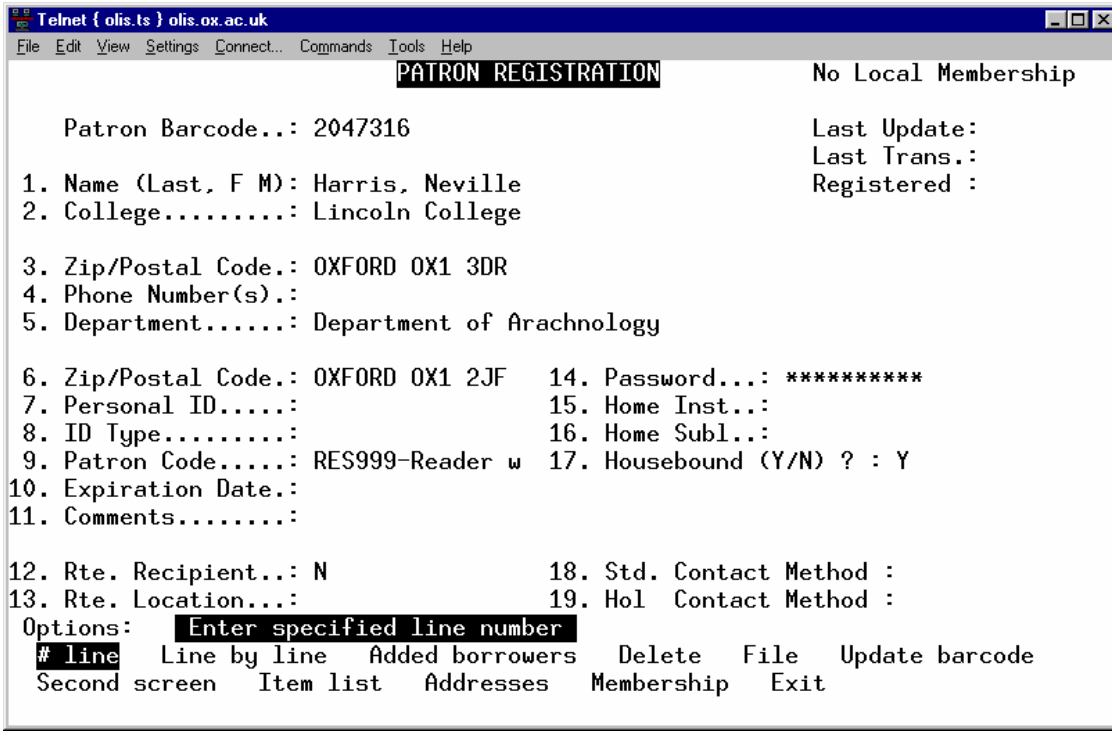

Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
PATRON REGISTRATION
No Local Membership
Patron Barcode..: 2047316
Last Update:
Last Trans.:
1. Name (Last, F M): Harris, Neville
Registered :
2. College.....: Lincoln College
3. Zip/Postal Code.: OXFORD OX1 3DR
4. Phone Number(s).:
5. Department.....: Department of Arachnology
6. Zip/Postal Code.: OXFORD OX1 2JF
14. Password...: **********
7. Personal ID.....:
15. Home Inst..:
8. ID Type.....:
16. Home Subl..:
9. Patron Code.....: RES999-Reader w
17. Housebound (Y/N) ? : Y
10. Expiration Date.:
11. Comments.....:
12. Rte. Recipient..: N
18. Std. Contact Method :
13. Rte. Location...:
19. Hol Contact Method :
Options: Enter specified line number
line Line by line Added borrowers Delete File Update barcode
Second screen Item list Addresses Membership Exit

Fig. 1.4: "No local membership" Borrower Record

Creating a new Membership

Step 1

Select the **Membership** option from the option bar and press <**Return**>. A screen similar to the following will appear:

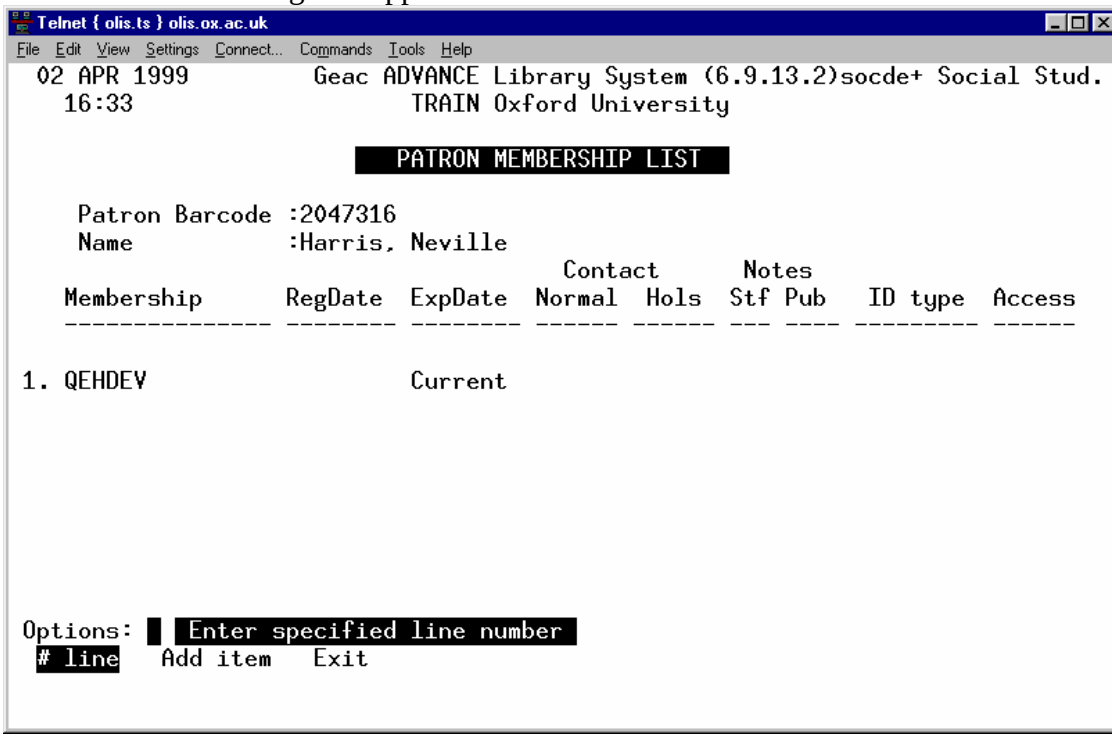

Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
02 APR 1999 16:33
Geac ADVANCE Library System (6.9.13.2)socde+ Social Stud.
TRAIN Oxford University
PATRON MEMBERSHIP LIST
Patron Barcode :2047316
Name :Harris, Neville
Contact Notes
Membership RegDate ExpDate Normal Hols Stf Pub ID type Access
1. QEHDEV Current
Options: Enter specified line number
line Add item Exit

Fig. 1.5: Patron Membership List

Step 2

Select **Add item** and press **<Return>**. A screen similar to the following will appear:

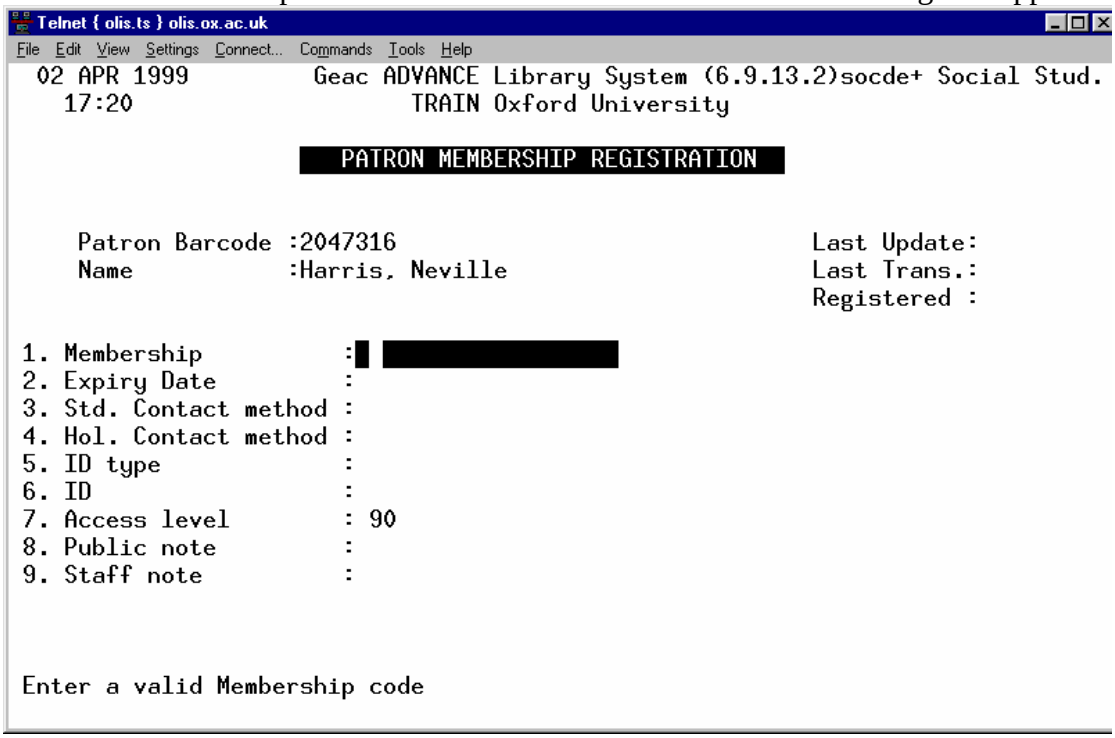

Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
02 APR 1999 Geac ADVANCE Library System (6.9.13.2)socde+ Social Stud.
17:20 TRAIN Oxford University
PATRON MEMBERSHIP REGISTRATION
Patron Barcode :2047316 Last Update:
Name :Harris, Neville Last Trans.:
Registered :
1. Membership :
2. Expiry Date :
3. Std. Contact method :
4. Hol. Contact method :
5. ID type :
6. ID :
7. Access level : 90
8. Public note :
9. Staff note :
Enter a valid Membership code

Fig. 1.6: Patron Membership Registration screen

Note that at the top of this screen the information generated in the registration process, or generated by other transactions on the system, which appears at the top of the first CPR screen, will be duplicated.

Step 3

The cursor will appear in field 1 in this *Patron Membership Registration* screen in order to be able to file the new membership (see the brief guide below, 1.19-20). However, it is possible to enter data in other fields at this point if desired (see the detailed line-by-line notes on 1.20-2).

- Brief guide

Step 4

With the cursor in field one, type in the patron membership code you wish to use if you know it and press **<Return>**. Alternatively you may type a **??** and press **<Return>** to see the list of patron membership codes. To go to the part of the index listing the patron membership codes for your library, you should then select the option **Search Jump** and press **<Return>**, type in your library's three-letter code *in upper case*, and then press **<Return>** again. Locate the patron membership code to which you wish to link this reader (using the descriptions to guide you, then type in the line number of the code and press **<Return>**.

Step 5

The cursor will appear in field 2, and a default expiry date for the membership will be calculated in this field. Press **<Space>** and then **<Return>** to accept this date and to go down to the option bar. (NB: It is possible to edit this date if desired - see the detailed line-by-line notes below).

Step 6

Select the **Accept** option and press **<Return>** to return you to the first Patron Registration screen. You **must** then select **File** and press **<Return>** at the first screen to save your changes.

- The Membership screen line by line

To enter any data in any fields 1 to 9, select the **#line** option, type a field number and press **<Return>** to access a particular field, and press **<Return>** when you have typed in the required data to go back to the option bar. Alternatively, you may select the **Line by line** option and press **<Return>** to go through each of the nine fields in turn, entering data as required. Required fields **must** be completed or you will be prevented from saving the new membership.

1. Membership

Required. Please see step 4 in the brief notes on 1.19 above.

2. Expiry Date

System assigned, but may be edited. This date controls when the reader's membership in your library will expire. A date calculated from the parameters set up for each borrower group will automatically appear in this field when you enter a patron membership code in field 1. You may accept this default simply by pressing **<Return>**, or edit this system-assigned expiry date at this point by overwriting the date shown and pressing **<Return>**. (The formats DD/MM/YY, DD-MM-YY, DD.MM.YY, etc., as well as formats including four digits for the year, will all be accepted, though any date you enter will be displayed in the format 31 DEC 2000.) The default expiry date for each patron membership code can be controlled in the circulation set up tables for your library (see Circulation Set Up Manual 7.12-3, 21).

3. Std. Contact Method:

Optional. Contact methods to be used when generating circulation notices for individual readers can be entered in Fields 3 and 4. These fields can be left blank as the system will then pick up any default entry for the entire patron membership (see Circulation Set Up Manual 7.15-9, 23). However, you should enter a contact method in field 3 if you wish to use a contact method other than this default entry in the case of this individual reader. Type in the required code if you know it and press **<Return>**, or type **??** and press **<Return>** to see a list of the available contact method options. (These options are explained in Circulation Set Up Manual 7.16-8.) You should **not** enter an option including a number unless an address is entered in the corresponding field of the reader's **Addresses** screen (see below

1.28-30). If you wish to send *all* of an individual reader's circulation notices by email, enter the appropriate contact method in field 3 (you will probably find **E** the most convenient contact method to use for email). Please note that there are further preconditions for use of the emailing of notices - please consult the emailing of notices documentation (Circulation Set Up Manual, appendix I) if your library is considering starting to use this feature.

4. Hol Contact Method

Optional. It is possible to specify vacation or other exceptional dates in the table CIHP when you may wish notices to be generated for individual readers or patron membership groups using a contact method other than that used for them at other times (see Circulation Set Up Manual 7.28-35). If this has been done for your library, this field can be used for such periods as field 3 is for ordinary periods; i.e., to override any default contact method set for the patron membership group in the case of an individual reader. (Please note that field 4 is currently almost always left blank by libraries.) Please do **not** use a contact method option including a number unless an appropriate address for the reader is entered in the corresponding field of their Addresses screen (see below 1.28-30). If you wish to send all of an individual reader's circulation notices by email during exceptional contact periods, enter the appropriate contact method in this field (you will probably find **E** the most convenient contact method to use for email). Please note that there are further preconditions for the use of emailing of notices in your library - please consult the emailing of notices documentation (Circulation Set Up Manual, appendix I) if your library is considering starting to use this feature.

5. ID Type

Optional. If you enter an ID in field 6 below, enter a description of the type of ID here. For example, if you enter a national insurance number in field 6, you could enter NI here

6. ID

Optional. A Personal ID number (including letters) unique to the borrower, such as a national insurance number, may be entered. Such a number could be used to retrieve this borrower at the Enter Borrower Name or Barcode: prompt, if entered preceded by *ID=*. However, as a borrower's name or barcode number is more commonly used to retrieve the record, it should *very rarely* be necessary to use fields 5 and 6 in this screen.

7. Access level

This number controls who is allowed to view the borrower's membership in your library. .By default this will be set to 90. Do

not change this.

8. Public note

Optional. Notes can be entered here. You will go into an editing window if you access this field, which can be exited by typing **<Esc>** and then **<e>**. Please note that this field is visible to the reader, but not to staff in other OLIS circulation libraries. (You are advised to consult 2.7-12 for more information about the various notes fields available before entering data in this field.)

9. Staff note

Optional. Notes can be entered here. You will go into an editing window if you access this field, which can be exited by typing **<Esc>** and then **<e>**. Please note that this field is visible only to staff in your library. (You are advised to consult 2.7-12 for more information about the various notes fields available before entering data in this field.)

Note that any data entered in fields 2, 3, 4, 5 and 6 will also appear respectively in fields 10, 18, 19, 8 and 7 in the first CPR screen when the borrower record is retrieved in your library. Once you have given the reader a membership and entered data in any of these ten fields, you will therefore not need to enter the same data in the corresponding field in the other screen.

Step 4

Select **Accept** and press <**Return**> to go back to the first borrower registration screen.

Step 5

ÐIt is now ***essential*** to select **File** and press <**Return**> to save the changes and to attach the membership record you have just created to the reader. If you do not do this, the reader will still be unable to borrow from your library.

Editing Memberships

Use the following guidelines if you wish to alter any information in an existing borrower's membership at your library.

Step 1

Access the patron registration screen by typing or selecting the option for **CPR** and pressing **<Return>** at any menu in the circulation module. The following prompt will appear:

```
Enter Patron Name or Barcode:
```

Step 2

Wand in the borrower's barcode, or type in their name (in the format *surname, forename*) or barcode number and press **<Return>**. The system will either go directly to the borrower record (if a barcode is entered), or to a borrower browse list (if a name is entered). In this latter case, type the line number for the borrower record you wish

to access and press **<Return>**. The first CPR or *Patron Registration* screen now appears.

Step 3

Select the **Membership** option from the option bar and press **<Return>**. A screen similar to the following will appear:

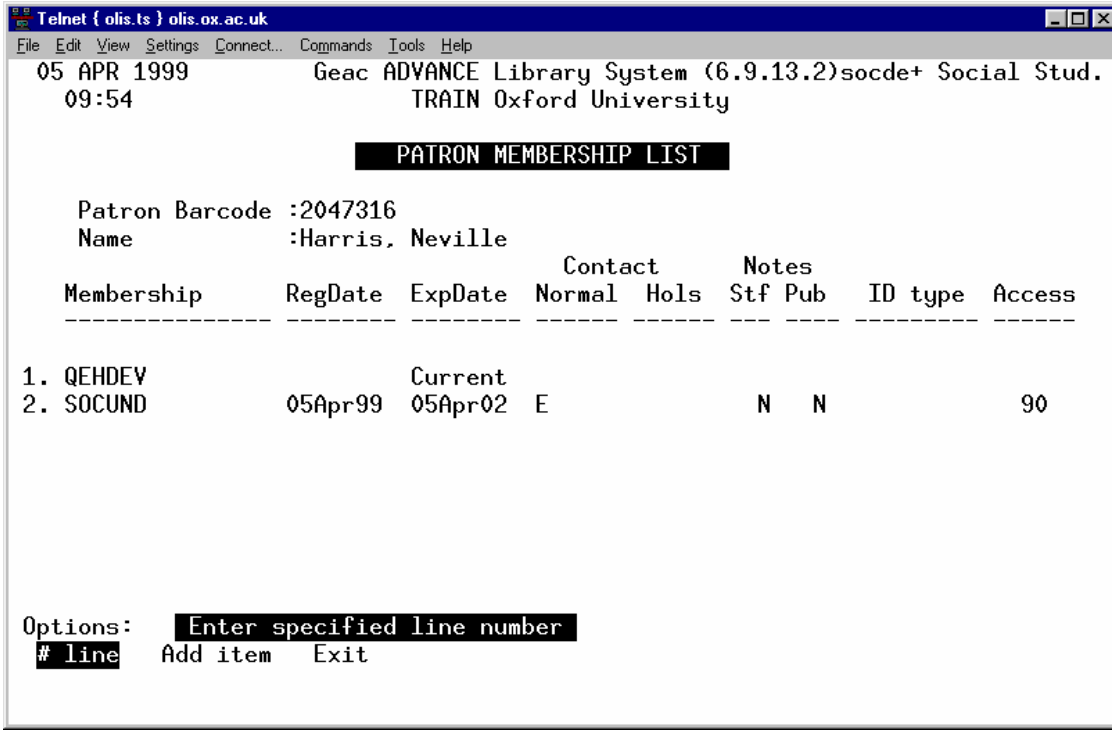

Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
05 APR 1999 Geac ADVANCE Library System (6.9.13.2)socde+ Social Stud.
09:54 TRAIN Oxford University
PATRON MEMBERSHIP LIST
Patron Barcode :2047316
Name :Harris, Neville
Membership RegDate ExpDate Contact Normal Hols Notes Stf Pub ID type Access
1. QEHDEV Current
2. SOCUND 05Apr99 05Apr02 E N N 90
Options: Enter specified line number
line Add item Exit

Fig. 1.7: Patron Membership List (with **#Line** option selected)

Step 4

The system defaults to the **# line** option on the option bar. Type the correct line number for the membership you wish to edit (e.g. **2**) and press **<Return>**.
NB: At this point the following message may appear:

You do not have permission to view this data. Press <ENTER> :

This error message will appear if you accidentally select the line for a membership given to a patron by another library. We advise you to attempt to access the membership for your library again, making sure that you enter the correct line number. If the error message appears again, contact LAS.

Step 5

Once you have accessed the Patron Membership Registration screen for your library, the cursor will default to the **# line** option. Type in the line number you wish to edit and press **<Return>**. Use the notes above (1.19-22) in editing this screen.

Step 6

Make any corrections or additions and press **<Return>** to go back to the option bar or use **<Esc><e>** to get out of an editing window.

Step 7

Select the **Accept** option and press **<Return>** to return you to the first Patron Registration screen. You **must** then select **File** and press **<Return>** at the first screen to save your changes.

Membership Deletion

It is possible to delete a reader's membership at your library once it has expired, or the reader has left the University, or they have ceased to use your library. However please note that it would be inadvisable to do this (particularly on any large scale) if you will later require statistics on numbers of borrowers and their activities during periods when such readers were borrowing from your library, since it will not be possible to retrieve statistics on any such borrower once their membership has been removed. We thus advise that you remove obsolete memberships every year in August after you have obtained any required annual borrower statistics.

It is possible for you to run a job called PEXPIRE, which will provide you with a report on which memberships in your library are obsolete, and will thus assist you in determining which memberships can be deleted at such a time. The procedure, and that for the deletion of readers' memberships, is explained in the Circulation Set Up Manual, Appendix H.2-5, 8-11.

If you wish to delete a reader's registration outright (i.e., not just their membership at your library) from the OLIS patron file, please see 2.19-20 below.

Optional Facilities

This section describes facilities in the borrower registration screens in which it is possible to enter additional information during the borrower registration process which may be of use. Please note that you will be unable to update any of this information before you give the reader a membership in your library. If you attempt to do this, the following error message will display:

Without membership you may not update this record. Press <RETURN>.

Second Screen

The second screen in CPR holds additional information on the reader which is shared by all OLIS circulation libraries from which the reader can borrow. Select **Second Screen** and press **<Return>** to see a screen similar to the following:

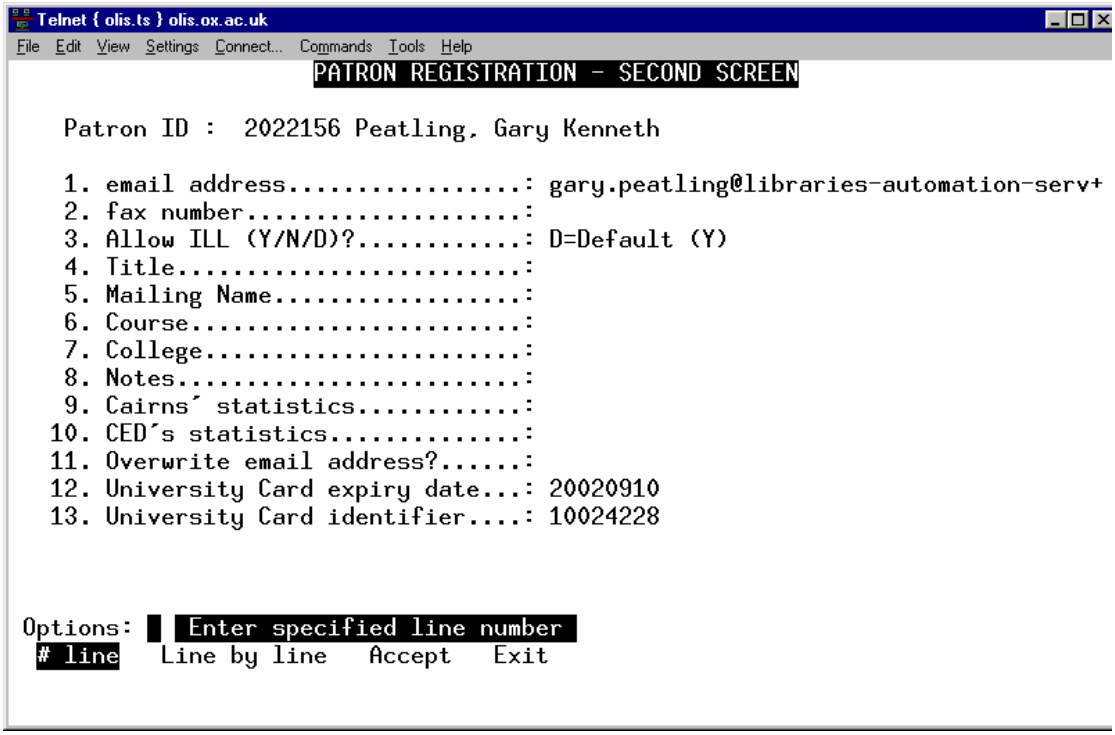

Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
PATRON REGISTRATION - SECOND SCREEN
Patron ID : 2022156 Peatling, Gary Kenneth
1. email address.....: gary.peatling@libraries-automation-serv+
2. fax number.....:
3. Allow ILL (Y/N/D)?.....: D=Default (Y)
4. Title.....:
5. Mailing Name.....:
6. Course.....:
7. College.....:
8. Notes.....:
9. Cairns' statistics.....:
10. CED's statistics.....:
11. Overwrite email address?.....:
12. University Card expiry date...: 20020910
13. University Card identifier....: 10024228
Options: Enter specified line number
line Line by line Accept Exit

Fig. 1.8: Patron Registration Second Screen

To edit any field, select the **#line** option, type the line number of the required field, then press **<Return>**. Then type in the required data and press **<Return>** to go back to the option bar. All of these fields are optional, but those listed with an * below are most useful:

**1. e-mail address*

Updated information regarding the university email addresses of readers is automatically uploaded regularly from OUCS data into this field and may be used in the emailing of notices. Please note that if an email address appears in this field 1, it does not *necessarily* mean that any notices generated in your library for this reader will be sent by email; the default is in fact to generate printed notices, and you can control the contact method used for this reader elsewhere (see above, 1.15-6 or 1.20-1). As the email field in CPR will be shared by all the libraries at which a reader has a membership, ordinarily it will **not** be advisable for librarians to alter this information, although circumstances may arise in which this is necessary. You will be able to enter a non-University email address for any reader in this field, or to clear this field of any University email address (by typing # and then **<Return>**), but as the data upload from OUCS is performed regularly, any University email address for the reader would be loaded back into this field, overwriting any manual entered address, **unless** you enter **N** in field 11 in this screen (see below).

Please note however that since this field may be used by any circulating libraries at which this reader has a membership, it would be best first to ascertain that such a reader does not wish to receive emailed notices from *any* of these libraries. If you do enter a non-University email address in field 1 of CPR second

screen for any reader, please do **not** leave any spaces in this field, as this will cause any email notices generated for such a reader to bounce.

2. fax number — Enter an individual fax number here if desired.

3. Allow ILL (Y/N/D)? — Not yet implemented in Oxford. Please ignore this field.

**4. Title* — Enter the reader's title (e.g., Mr, Mrs, Dr., Professor etc.) here - this can appear on notices and reports if required. See Circulation Set Up Manual 2.25-9 on how notice formats can be set up to include patron titles.

5. Mailing Name — A way of tackling the problem of changing the format of readers' names so they will appear on notices as *forename surname* (rather than *surname, forename* as they are listed in the OLIS patron file) is for the reader's name to be entered here as *forename surname*. Please contact LAS if you would like further to explore this feature.

6. Course* — A course code may be entered here from an underlying table. Type **?? to see a list of options. Select the **Search jump**, **Forward** or **Backward** options and press **<Return>** on this list to see further options. Please note that the accurate completion of this field will facilitate the running of certain kinds of report (i.e., on borrowing of items by type of course).

7. College* — A college code may be entered here from an underlying table. Type **?? to see a list of options. Select the **Search jump**, **Forward** or **Backward** options and press **<Return>** on this list to see further options. Please note that the accurate completion of this field will facilitate the running of certain kinds of report (i.e., on borrowing of items by reader's college).

8. Notes* — Notes can be entered here. Please note that this field is visible to all circulation library staff in Oxford but **not to the reader. (You are advised to consult 2.7-12 for more information about the various notes fields available before entering data in this field.)

9. Cairns' statistics — Please leave blank (unless you work at Cairns)

10. CED's statistics — Please leave blank (unless you work at Continuing Education)

11. Overwrite email address? — If you wish to email circulation notices to a reader who does not have current regular access to the University email address automatically loaded into OLIS (because they are away on a

research trip, for instance), but *does* have regular access to a different email account, you could type this address in field 1, so that they would receive any emailed notices at that address. It would also be necessary to enter **N** in field 11, to ensure that this address is not overwritten by any University email address in the regular uploads from OUCS data. Also enter **N** in this field if you have removed the email address in field 1 in this screen and do not wish it to be written back in. However, since the information in this screen can be used by any circulation library, you should **not** set this field 11 to N unless you know that the reader does not wish to receive circulation notices from any OLIS circulation library via their university email account. In the vast majority of cases you should leave this field blank.

12. University Card expiry date

Indicates the expiry date on the reader's current University card (in the format YYYYMMDD). Data from the University card database is uploaded daily, so although some delay is possible, the display here should be as up to date as possible. ***Do not alter this field***. The date displayed here may be of some guidance when the expiry date of a reader's membership is set in the Membership screen.

13. University Card identifier

Where applicable, the reader's SISYS number or unique identifier from the University card system will appear here. ***Do not alter this field***. If this field is blank, this indicates that the reader does not currently (or has not previously) had a University card - i.e., that they have previously been manually loaded into the OLIS patron file using an LAS supplied barcode or local library card. Data from the University card database is uploaded daily, so although some delay is possible, the display here should be as up to date as possible, and may be of some guidance in giving memberships in your library to readers whose history is uncertain.

Whenever you have finished making any changes to this screen, select **Accept** and press **<Return>** to save your changes to go back to the Patron Registration or first CPR screen. You must then also select **File** and press **<Return>** to save your changes.

Addresses

Two addresses may be entered for a reader in the first Patron Registration or CPR screen (see above 1.11, 12). If further addresses will be needed for the generation of notices for the borrower, it is necessary to select the **Addresses** option from this screen and press **<Return>**. A *Patron Addresses* screen appears with ten fields for addresses.

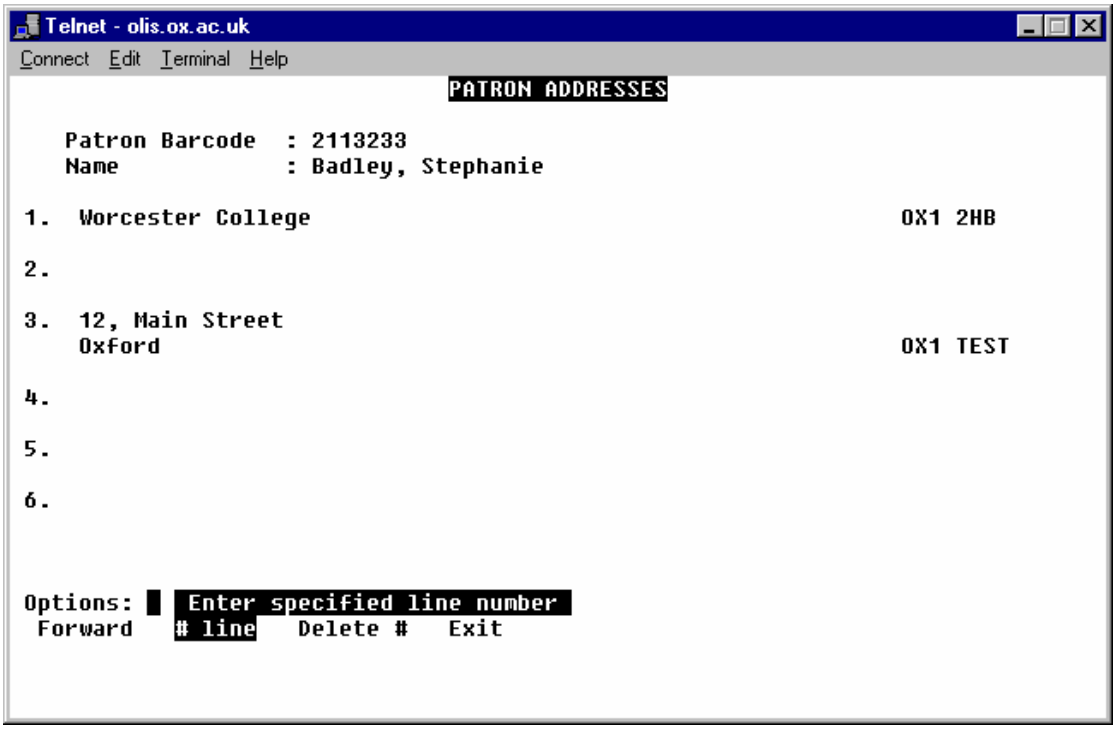


Fig. 1.9: Patron Addresses screen

The ten address fields are labelled as follows on the system:

1 College
2 Department
3 Home (term)
4 Home (vacation)
5 Home Institution
6 Tutor/Supervisor
7 DOBIS Address 1
8 DOBIS Address 1
9 DOBIS Address 1
10 DOBIS Address 1

NB: Address fields 7 to 10 will contain up to 4 addresses (in alphabetical order by library prefix) transferred from the DOBIS system on which OLIS used to be based. You will not need to add new addresses here or use these addresses in the production of notices.

By default any address entered in the second and third field (labelled **College**) of the first Patron Registration or CPR screen (the Patron Registration screen) will also appear in field **1** in this Addresses screen. Any address entered in the fifth and sixth fields (labelled **Department**) of the first Patron Registration screen will also appear in field **2** in this Addresses screen. It is however possible to change these defaults so that you will be prompted for different types of address in the first Patron Registration screen (for instance vacation home address) if you find that you frequently wish to use a different type of address when sending notices to readers (see Circulation Set Up

Manual, 7.4-5). If these defaults are changed, entries you make in fields 2 and 5 of CPR first screen will appear in the appropriate fields of this Addresses screen.

This Addresses screen can also be used to enter any further addresses in the appropriately labelled fields that you wish to use in generating notices for readers. By default any circulation notices generated for a reader will print displaying the reader's College address (in field 1 of this Addresses screen). *Please note* however that the numbering of these address fields refers back to the numbering in the contact methods which **may** be entered in fields 18 and 19 of the CPR first screen, or in fields 3-4 of the Patron Membership Registration screen (see above, 1.15-6, 20-1). You may encounter difficulties with notice generation if you specify a contact method at individual borrower level, at patron membership group level (see Circulation Set Up Manual 7.15-9, 23-4), or at notice code level (see Circulation Set Up Manual, 2a.6-7) which refers to a type of Address for which the reader(s) concerned do(es) **not** have an entry in their Addresses screen(s). For instance, if you use contact methods M3 or E3 for a patron membership group, you should ensure that you do have a reader postal address entered in field 3 (for term-time home address) in the Addresses screen of affected readers.

To add an address, select the **# line** option, type the relevant number (e.g., **3** for term-time home address) and press **<Return>**. An editing window will appear:

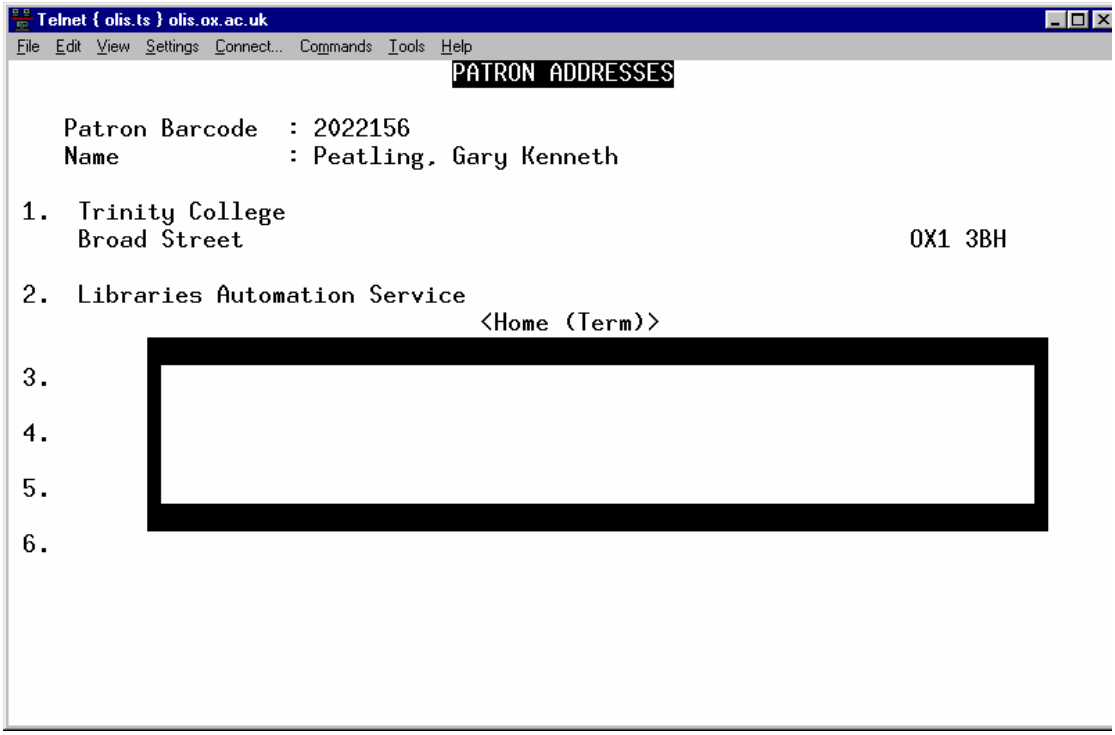


Fig. 1.10: Patron Addresses screen with open window for term-time home address

You may enter up to four lines of data for the main body of the address. Then type **<Esc>** and then **<e>** to exit the window. The cursor will move to the postcode field where you may enter a postcode (you will be asked if you wish to create a new record if you are entering a postcode not previously on the system - see above 1.11-2). Then press **<Return>** to go back to the option bar. Select **Accept** and press **<Return>** to

go back to the first CPR screen. Here it is essential to select **File** and press **<Return>** if you wish to save your changes.

If you wish to edit or change one of a reader's existing addresses, select the **# line** option, type the relevant number and press **<Return>**. An editing window will open containing the existing address. You may then overtype a new address or use the **<Esc><o>** function (i.e., press **Escape** and then **o**) if you wish to insert further characters within the text of an existing address. When you type **<Esc>** and then **<e>** the cursor will again go into the postcode field where you can make any changes desired. Then select **Accept** and press **<Return>** to go back to the first CPR screen. Here it is essential to select **File** and press **<Return>** if you wish to save your changes.

Added Borrowers

An added borrower is usually an assistant of some description to a registered borrower, who can borrow items for and on behalf of that borrower. A *separate* borrower registration and barcode should **not** be given to an added borrower (though in some cases they may already be registered on OLIS, e.g., in the case of student assistants to faculty members); they can instead be registered on the system by being added to the registered borrower's record at the membership level. All checkouts and derived obligations remain the responsibility of the registered borrower and will be attached to that record. Added borrowers can only be attached to a registered borrower's registration on the system if (s)he is linked to a patron membership code for whom this privilege has been enabled, which can be controlled by libraries in their circulation setup (See Circulation Set Up Manual, 7.21). It should be pointed out to the registered borrower that their loan allowances are *not* increased through an added borrower being linked to their registration.

[NB: Added borrowers can also be added at Checkout. When the borrower record of a reader with added borrowers is retrieved during the Checkout process, the system provides a list of current added borrowers. The available options at this point include the ability to delete existing added borrowers or to add new ones. See 4.15-7 on how added borrowers are used at checkout.]

Adding an Added Borrower to a Registered Borrower's Record

Step 1

From within the Patron Registration (or CPR) first screen for the borrower to whom you wish to link the Added borrower, select the **Added borrowers** option and press **<Return>**.

If the borrower is not attached to a patron membership group with this privilege, the following message displays at the bottom of the screen:

No Additional Borrowers may be added to a xxxxx patron.

(where XXXXX is the patron membership group of this borrower). If the possibility of an additional borrower *is* allowed, then a screen similar to the following will appear:

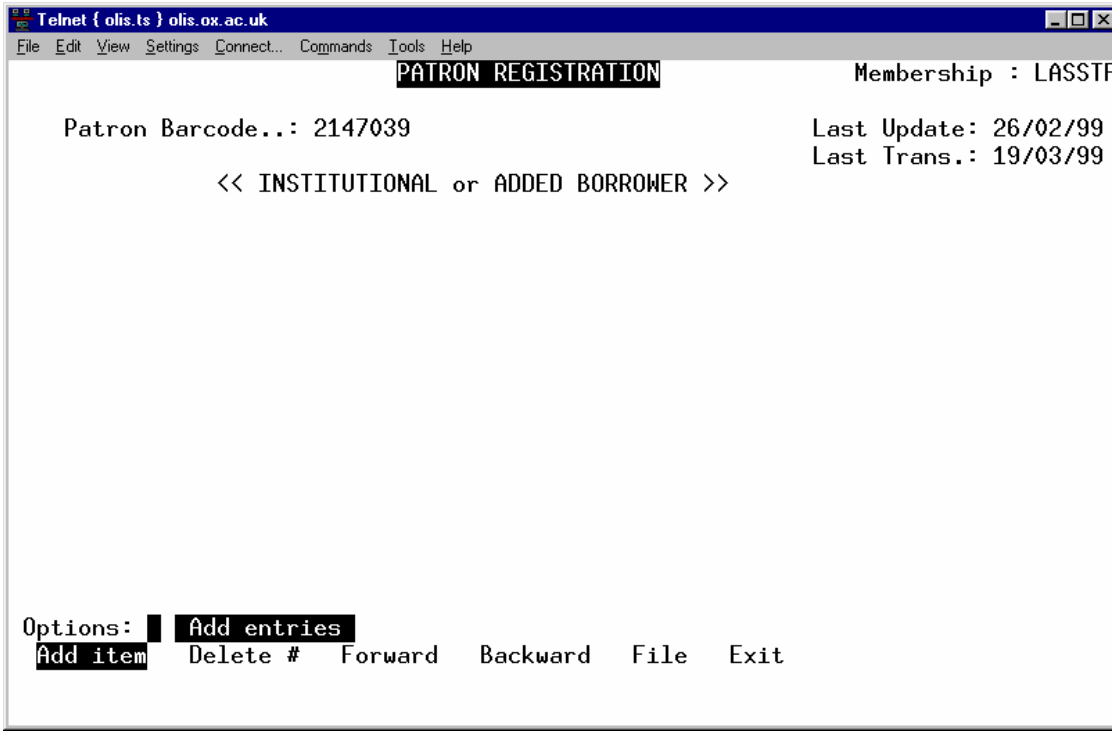


Fig. 1.11: Added Borrowers screen

Step 2

Select **Add item** and press **<Return>** to add a borrower. The prompt:

Borrower's Name or Barcode: _____

will appear. Type in the name of the added borrower here (in the format *surname, forename*) and press **<Return>**. Data entered here can be displayed on the checkout screen as items are checked out to the added borrower on behalf of the registered user.

Step 3

On the next line the system prompts:

Borrower's ID and ID Type: _____

This is a free text field which allows you to enter some distinguishing ID for the added borrower if required, plus a note on the type of ID used. An address or telephone number for the added borrower, which could be used should library staff need to contact the added borrower directly, could also be entered. A limit of thirty characters entered in this field will display. If the added borrower has a University or other library card, a barcode number could be entered in this field as an ID. Type some identifying details and press **<Return>**.

Step 4

Then the system will give a final prompt:

Are you sure this is correct Y/N? _

Answer **Y** and press **<Return>** if correct.

The name and ID of the Added Borrower will appear in the list at the top of the screen.

The prompt:

Borrower's Name or Barcode: _____

will display, and you can enter the name and details of further added borrowers if desired, again using the above notes. When you have finished linking added borrowers to this patron record, press **<Return>** at this point to go back to the option line.

Step 5

Finally it is *essential* to select **File** and press **<Return>** to save the added borrowers and to go back to the first CPR screen. Then *also* select **File** and press **<Return>** to save your changes to the borrower record as a whole.

Editing or Deleting Added Borrowers

To remove an added borrower linked to a registered borrower, access the Added Borrowers screen of the registered borrower, select the **Delete #** option, type the line number of the added borrower you wish to delete and press **<Return>**. When you have finished making changes to this screen, select **File** and press **<Return>** to save your changes.

If you wish to alter any of the details for an existing added borrower, it is necessary to delete their existing added borrower record in this way, then to create a new record, using the above notes. When you have finished again select **File** and press **<Return>** to save your changes.

Saving changes to Borrower Registrations

The following three options can be used in the borrower registration screens when determining whether to save changes that you have made to borrower registrations.

Accept

This option appears at several of the secondary screens which can be accessed from the first CPR screen. Select this option if you wish to save any changes you have made in such a screen. However, you **must** then *also* select the **File** option at the first CPR screen before you leave the borrower record in order to save your changes.

File

You must select this option and press **<Return>** to save *any* changes made in the borrower's details in most of the patron registration or membership screens. It is thus good practice to choose the **File** option whenever it appears; this will ensure that all changes are secured on exiting any screen. ***If*** however you decide that all the changes you have made to a particular screen since last accessing it are incorrect, you may select the **Exit** option to leave the screen without saving the changes. If there is no

File option in a particular screen, select the **Accept** option to save your changes. If there is neither a File nor an Accept option in a screen, saving will not be necessary at that level, so simply select the **Exit** option: you will be able to **File** at the next screen.

Exit

This option takes you out of the borrower registration screens back to the last screen in the circulation module previously accessed, without saving any changes you have made to the borrower's record.

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Updating the Borrower Record and keeping track of the Borrower

Introduction

It is not possible to alter any of the information in a borrower's registration in CPR until you have given the reader a membership in your library. However once you have done this, the borrower record can be edited, and may be used to store and access up-to-date information about the borrower's activities in your library.

This chapter includes information on how to access a borrower record from different points in the system, how to edit the record (including adding notes), and how to register a lost card.

OLIS will retain a record of the items which a reader has borrowed from your library. This chapter also describes how this list may be accessed and printed.

Fines and blocks on the reader's record will be covered in more detail respectively in chs.6 and 6a.

Retrieving the Borrower Record

It is possible to retrieve the borrower record either directly through CPR or through the checkout screen. The name of the borrower who has just checked in an item will be displayed at checkin, and it is possible to *display* their patron record at this point: but it is *not* currently possible to *edit* the record or access any of the connected screens at this point.

- through the Borrower Registration Screen (CPR)

There are four ways of going into the borrower record through the borrower registration screen.

Entering a Borrower's Name

Select the option for or type **CPR** and press **<Return>** from any menu screen in the circulation module. At the prompt

Enter Patron Name or Barcode:

type all or part of a borrower's name (in the format *surname, forename*, e.g., **peatling, g** or **peatling** or **peat**) and press **<Return>**. A browse list of borrowers whose names are alphabetically closest to the term you enter will appear. The closest match will appear at lines 1-2 on this list.

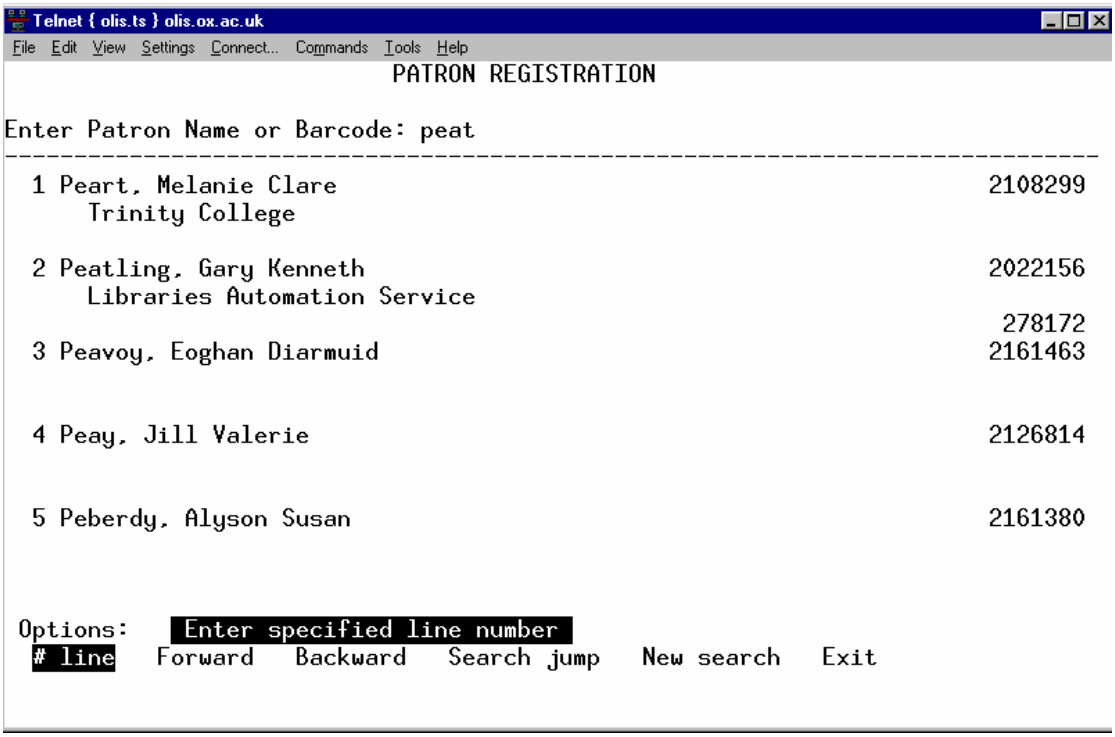
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
PATRON REGISTRATION
Enter Patron Name or Barcode: peat
1 Peart, Melanie Clare 2108299
Trinity College
2 Peatling, Gary Kenneth 2022156
Libraries Automation Service
278172
3 Peavoy, Eoghan Diarmuid 2161463
4 Peay, Jill Valerie 2126814
5 Peberdy, Alyson Susan 2161380
Options: Enter specified line number
line Forward Backward Search jump New search Exit

Fig. 2.1: Browse list of borrowers

Select the correct borrower from the browse list by typing the appropriate number (e.g., in this case number **2**) and press **<Return>**. The first *Patron Registration* screen will appear.

If you cannot locate the current borrower on the list, remember to check that you have entered the name correctly, and to try alternative spellings or formats for the name.

When you have finished updating any details of the borrower record, select **File** and press **<Return>** and you will be returned to the browse list. You can:

• Locate another borrower record. Select the option for **New search** and press **<Return>**, and the prompt for a patron name or barcode will appear.

• Return to a circulation menu by selecting **Exit** and pressing **<Return>**.

Entering a barcode

Select the option for or type **CPR** and press **<Return>** from any menu screen in the circulation module. At the

```
Enter Patron Name or Barcode:
```

prompt, you may wand in a reader's barcode or type in the barcode and press **<Return>**. The borrower record will display directly if an exact match for the barcode is found. If no exact match is found, the following message is displayed:

```
The record 2xxxxxx is missing from the PATRON file :
Do you want to create a new record (Y/N)?
```

Please type **N** for no and press **<Return>** and attempt to locate the borrower by name before you create a new record for them.

Once you have updated the borrower record, select **File** and press **<Return>** to save your changes and you will be prompted to enter another borrower name or barcode. Press **<Return>** again to go back to a circulation menu.

Entering LST

LST is a useful shortcut command which can be used in several places in OLIS to retrieve the last record accessed anywhere within the current module within the same session. It can be used through **CPR** to retrieve the patron record of the last borrower accessed through any screen in the circulation module (for instance check out). Type or select the option for **CPR** and press **<Return>** from any menu screen in the circulation module, and then type **lst** and press **<Return>** at the

```
Enter Patron Name or Barcode:
```

prompt. The system will display the record directly.

Once you have updated the borrower record, select **File** and press **<Return>** to save your changes and you will be prompted to enter another borrower name or barcode. Press **<Return>** again to go back to a circulation menu.

Entering an ID

If an ID has been entered in field 7 of a reader's first CPR screen, or field 6 of their membership screen, (see above 1.13, 21), you can use this to retrieve their borrower record. Type **CPR** and press **<Return>** from any menu screen in the circulation module. At the

```
Enter Patron Name or Barcode:
```

prompt, enter **id =** and then the complete ID number, exactly as it has been entered in the borrower record and press **<Return>**. The borrower record will display directly if found.

If you have entered the ID incorrectly, or for any reason it is not found, the following message will display.

```
Personal ID not found. Press <ENTER> :
```

Press **<Return>** and you will be able to search for the borrower again.

Once you have updated the borrower record, select **File** and press **<Return>** to save your changes, and you will be prompted to enter another borrower name or barcode. Press **<Return>** again to go back to a circulation menu.

Retrieving the Borrower Record

- through the Checkout screen

Step 1

Select the option for or type **COUT** and press **<Return>** from any menu screen in the circulation module.

Wand in the borrower's barcode or type the borrower's name (in the format *surname, forename*) and press **<Return>** at the prompt

```
Enter Patron Name or Barcode:
```

The system will either go directly to the checkout screen for that borrower record (if a barcode was entered) or to a borrower browse list (if a name was entered). In this latter case, locate the borrower on the list, type in the appropriate line number and press **<Return>**. The *Circulation Checkout* screen now appears:

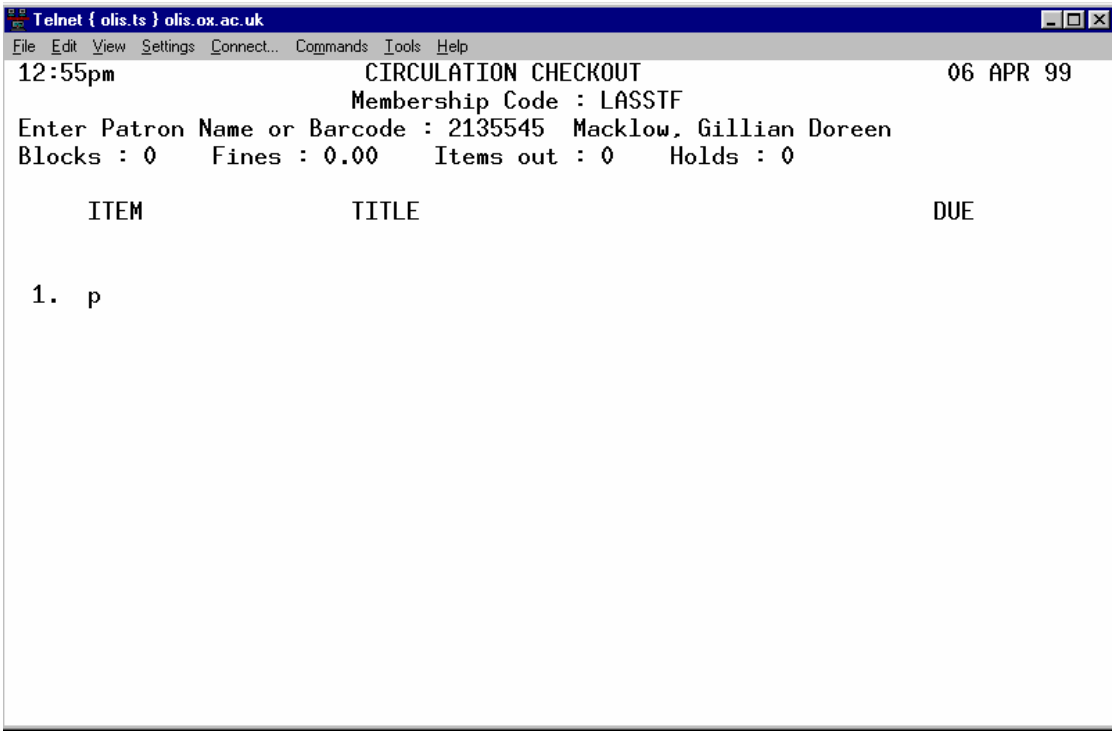
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
12:55pm CIRCULATION CHECKOUT 06 APR 99
Membership Code : LASSTF
Enter Patron Name or Barcode : 2135545 Macklow, Gillian Doreen
Blocks : 0 Fines : 0.00 Items out : 0 Holds : 0
ITEM TITLE DUE
1. p

Fig. 2.2 : Circulation Check out screen, with the command p entered

Step 2

Type **p** and press **<Return>** at the Item prompt and the borrower record will appear. At this point you will able to make any desired changes to the first CPR screen or to any of the subsequent screens for the retrieved reader.

Step 3

Once you have updated the borrower record, select **File** and press **<Return>** to save your changes. This will take you back to the checkout screen for the borrower.

Editing the Borrower Record

You have retrieved a borrow record by you may update it as desired. If you wish to update a field in the first screen, type the number of the line you wish to edit and press **<Return>**. The cursor will appear in the field ready for editing. If you wish to update one of the other screens in the patron record, select the appropriate option on the option bar and press **<Return>** to access the required screen. Refer to the sections indicated below for guidance.

- On the first CPR screen, see 1.9-16.
- On Added Borrowers, see 1.30-2.
- On adding or editing a reader's Addresses, see 1.28-30.
- On editing a reader's Membership in your library, see 1.17-24.
- On adding and editing Notes, see 2.7-12.
- On the Second screen, see 1.24-7.
- On updating Barcodes, see 2.18-9.

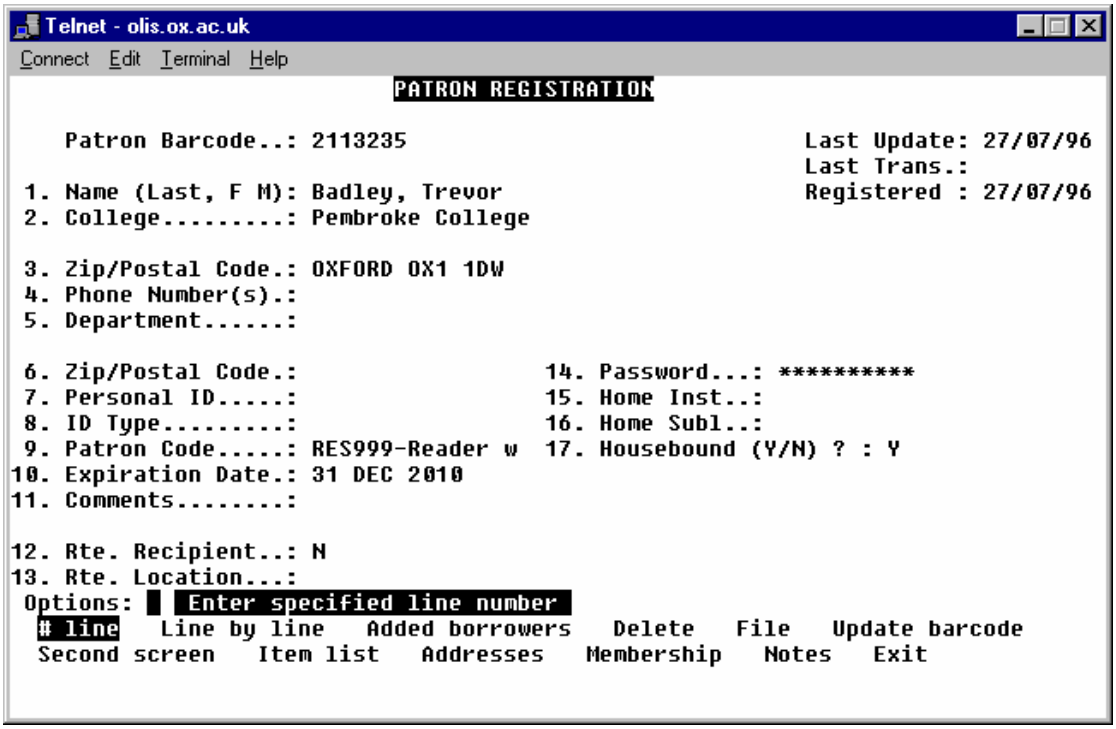

Fig. 2.3: The borrower record ready for editing

When you have finished making any changes in these subsequent screens, select the Accept or **File** option (whichever is available) and then press **<Return>**.

Make sure that you also select **File** at the first screen when exiting the first CPR screen in order to save your changes. It is good practice to choose the **File** option whenever it appears; this will ensure that all changes are secured on exiting any screen.

The following sections describe some typical changes you might wish to make to the borrower record of a reader who has a membership in your library.

Notes

There are four notes fields in patron records on OLIS. There are specific restrictions on the visibility or invisibility of each of these to staff and reader. By selecting a particular field in which to insert a note, you will thus be able to determine who will be able to see it. It is thus best to determine who you wish to see a note before you decide where to enter it.

ÐNB It is felt advisable that only staff who entered system-wide notes should delete them. Otherwise it is best to leave notes as they appear as they may still be relevant to other libraries.

1) Notes visible to staff in any OLIS circulation library and to the reader.

These should be inserted in the Patron Registration or CPR first screen field 11 (the field for Comments):

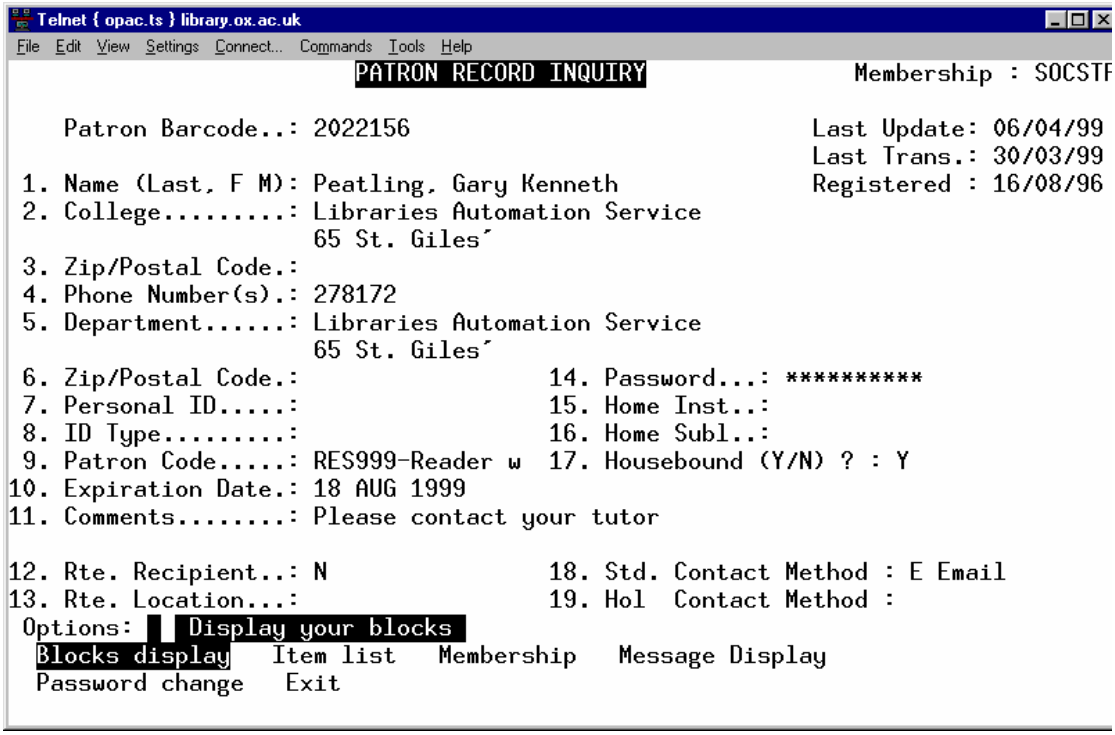

Fig. 2.4: First screen of borrower record, as seen from the OPAC

Notes entered here will be visible to a reader making an OPAC patron enquiry (see the OLIS Reader Pocket Reference Guide 3 in leaflet form at http://www.lib.ox.ac.uk/olis/rpr3/index.htm on how such an enquiry is made). This is the quickest way to leave a note visible to the reader. There is a limit of 125 characters in this field.

This note is *always* visible to readers and therefore should be used with caution as a staff note. It could be used to indicate to staff that another (confidential) note is available on the Second Screen.

e.g. "See note on second screen"

If you have added a note in this field, select **File** and then press **<Return>**.

*NB University card database notes will be inserted in this field, where they exist.

2) Notes visible to staff in any OLIS circulation library but not to the reader.

These should be inserted in the Patron Registration Second Screen Field 8 (the field labelled Notes):

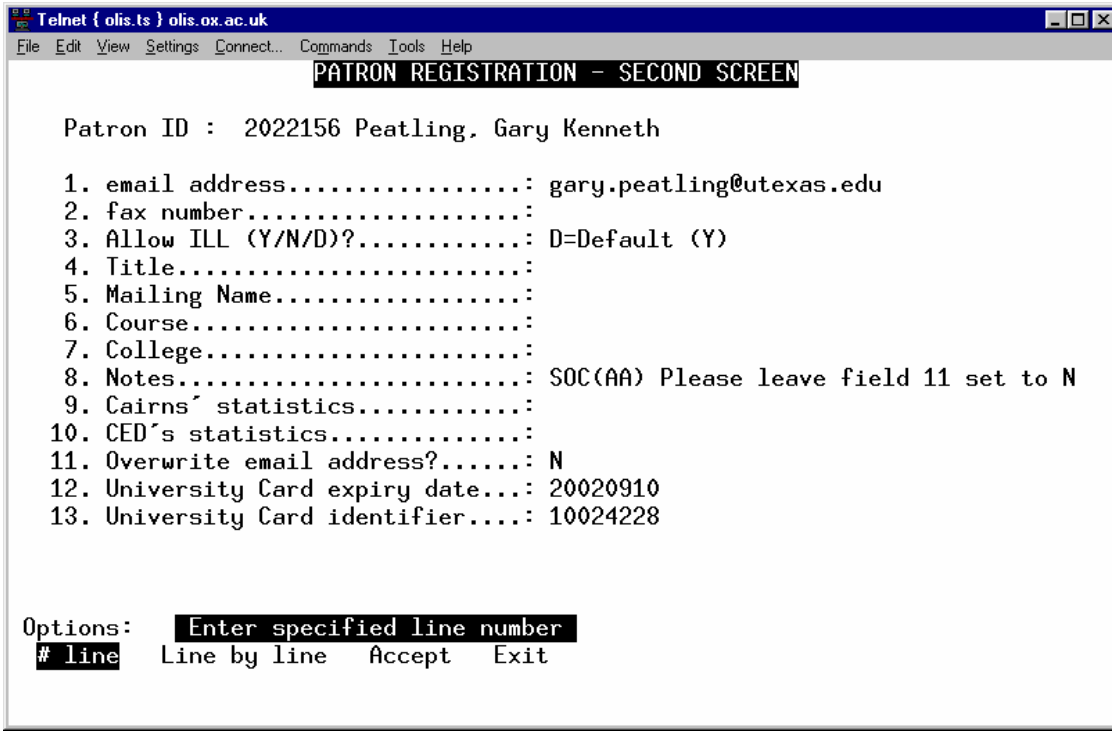
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
PATRON REGISTRATION - SECOND SCREEN
Patron ID : 2022156 Peatling, Gary Kenneth
1. email address.....: gary.peatling@utexas.edu
2. fax number.....:
3. Allow ILL (Y/N/D)?.....: D=Default (Y)
4. Title.....:
5. Mailing Name.....:
6. Course.....:
7. College.....:
8. Notes.....: SOC(AA) Please leave field 11 set to N
9. Cairns' statistics.....:
10. CED's statistics.....:
11. Overwrite email address?.....: N
12. University Card expiry date...: 20020910
13. University Card identifier....: 10024228
Options: Enter specified line number
line Line by line Accept Exit

Fig. 2.5: Second Screen of Borrower Record - only visible to staff

Readers cannot view this field so it can be used for more confidential notes, or notes unlikely to be of interest to readers. As fields in this screen can be changed by staff in all OLIS circulation libraries at which the reader has a membership, this field might be used to warn such staff about unusual features or not to make certain changes in this screen, for instance, in connection with the emailing of notices.

This field is actually 250 characters long, but as only 40 characters will be visible at any one time, it is advised that notes are kept succinct.

It is recommended practice that the note should be prefixed with the three letter library code and staff name or initials, as this will aid communication between libraries if necessary.
e.g.

"SOC(AA) Please leave field 11 set to N"

If you have added a note in this field, select **Accept** and press **<Return>** to save your changes to the second screen. Then select **File** and press **<Return>** at the first CPR screen to save your changes to the borrower record as a whole.

Some data concerning second screen fields completed centrally by LAS following the migration of data from DOBIS (e.g., information on course or college) may still occasionally appear in this field:
e.g.

"*NB two different colleges named in separate migrated data from QEH and SOC"

3) Notes visible only to staff in your library and to the reader

These should be inserted in the Patron Membership Registration screen field 8 (the field for Public note):

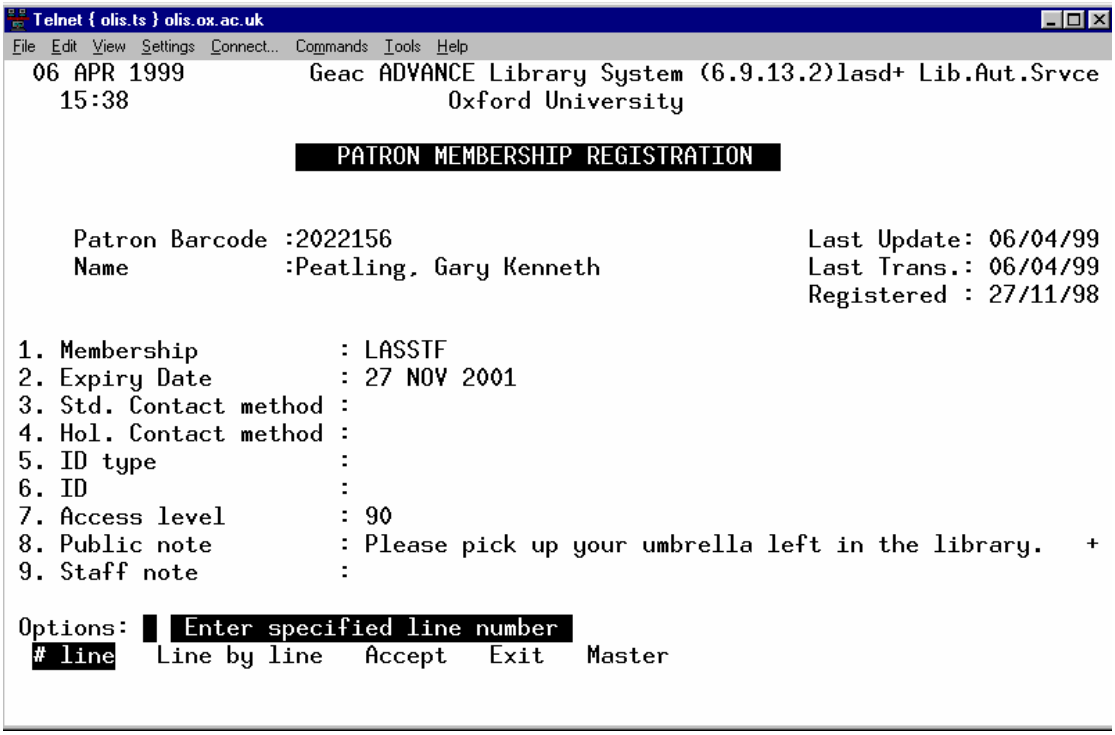
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
06 APR 1999 Geac ADVANCE Library System (6.9.13.2)lasd+ Lib.Aut.Srvce
15:38 Oxford University
PATRON MEMBERSHIP REGISTRATION
Patron Barcode :2022156 Last Update: 06/04/99
Name :Peatling, Gary Kenneth Last Trans.: 06/04/99
Registered : 27/11/98
1. Membership : LASSTF
2. Expiry Date : 27 NOV 2001
3. Std. Contact method :
4. Hol. Contact method :
5. ID type :
6. ID :
7. Access level : 90
8. Public note : Please pick up your umbrella left in the library. +
9. Staff note :
Options: Enter specified line number
line Line by line Accept Exit Master

Fig. 2.6: Patron Membership Registration screen (OPAC Public note field 8)

Notes entered here will again be visible to a reader making an OPAC patron enquiry (see the OLIS Reader Pocket Reference Guide 3 in leaflet form or at http://www.lib.ox.ac.uk/olis/rpr3/index.htm on how such an enquiry is made), but will not be visible to staff at other libraries. When you access this field you will be taken into an editing window with practically unlimited entry space, and several lines of data can be seen by the reader making a patron enquiry. Type **<Esc>** and then **<e>** to exit the window. Only 52 characters however will display in this Patron Membership Registration screen when you leave the editing window - if there is further text not in view, a plus sign (+) will appear at the end of the line.

Use for notes such as

"Please pick up your umbrella left in the library."

When you have added a note in this field, select **Accept** and press **<Return>** to save your changes to this membership screen. Then select **File** and press **<Return>** at the first CPR screen to save your changes to the borrower record as a whole.

*NB Data migrated from the borrower text field of the old DOBIS system may appear here.

This notes field can also be accessed through field 3 of the **Notes** screen in CPR (see 2.12 below.)

4) Notes visible only to staff in your library but not to the reader.

These should be inserted in the Patron Membership Registration screen field 9 (the field for Staff note):

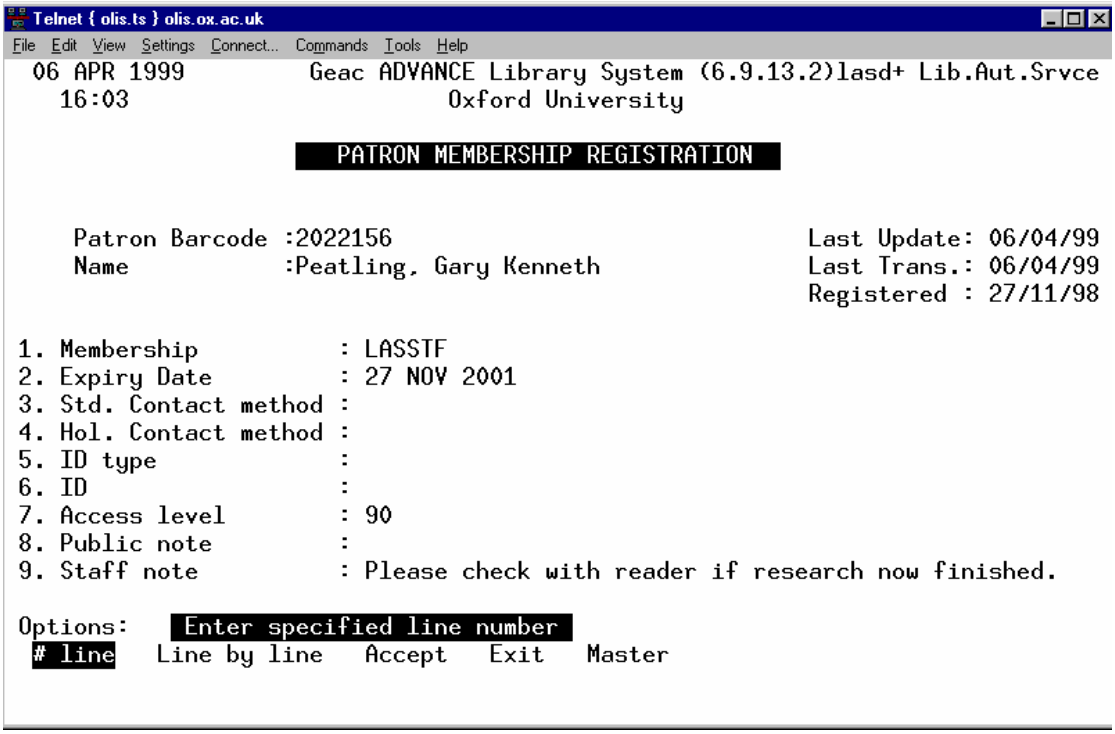
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
06 APR 1999 Geac ADVANCE Library System (6.9.13.2)lasd+ Lib.Aut.Srvce
16:03 Oxford University
PATRON MEMBERSHIP REGISTRATION
Patron Barcode :2022156 Last Update: 06/04/99
Name :Peatling, Gary Kenneth Last Trans.: 06/04/99
Registered : 27/11/98
1. Membership : LASSTF
2. Expiry Date : 27 NOV 2001
3. Std. Contact method :
4. Hol. Contact method :
5. ID type :
6. ID :
7. Access level : 90
8. Public note :
9. Staff note : Please check with reader if research now finished.
Options: Enter specified line number
line Line by line Accept Exit Master

Fig. 2.7: Patron Membership Registration screen (Staff note field 9)

This field can be used to enter notes which will only be of interest to staff at your library. When you access this field you will be taken into an editing window with practically unlimited entry space. Type **<Esc>** and then **<e>** to exit the window. Subsequently staff will only be able to see 52 characters of any message when they first access this screen, but a plus sign (+) will display if there is more text in this field than is immediately visible. The remaining text can then be displayed by selecting the **# line** option, typing **9** and pressing <**Return**>.

This field might be used to remind staff to check queries about details of the membership with the reader, e.g.,

"Please check with reader if research now finished."

When you have added a note in this field, select **Accept** and press **<Return>** to save your changes to this membership screen. Then select **File** and press **<Return>** at the first CPR screen to save your changes to the borrower record as a whole.

*NB Any migrated data from the borrower notes field from the DOBIS system will appear here.

This notes field can also be accessed through field 2 of the **Notes** screen in CPR (see below.)

Editing notes through the Notes option

The third and fourth type of note described above are thus specific to the reader's membership in your library. A Notes option will thus appear on the first Patron Registration or CPR screen of any borrower who has a membership in your library, and this can be used to add, edit or display either of these types of note. To access this screen select the **Notes** option from the first Patron Registration screen and press **<Return>**.

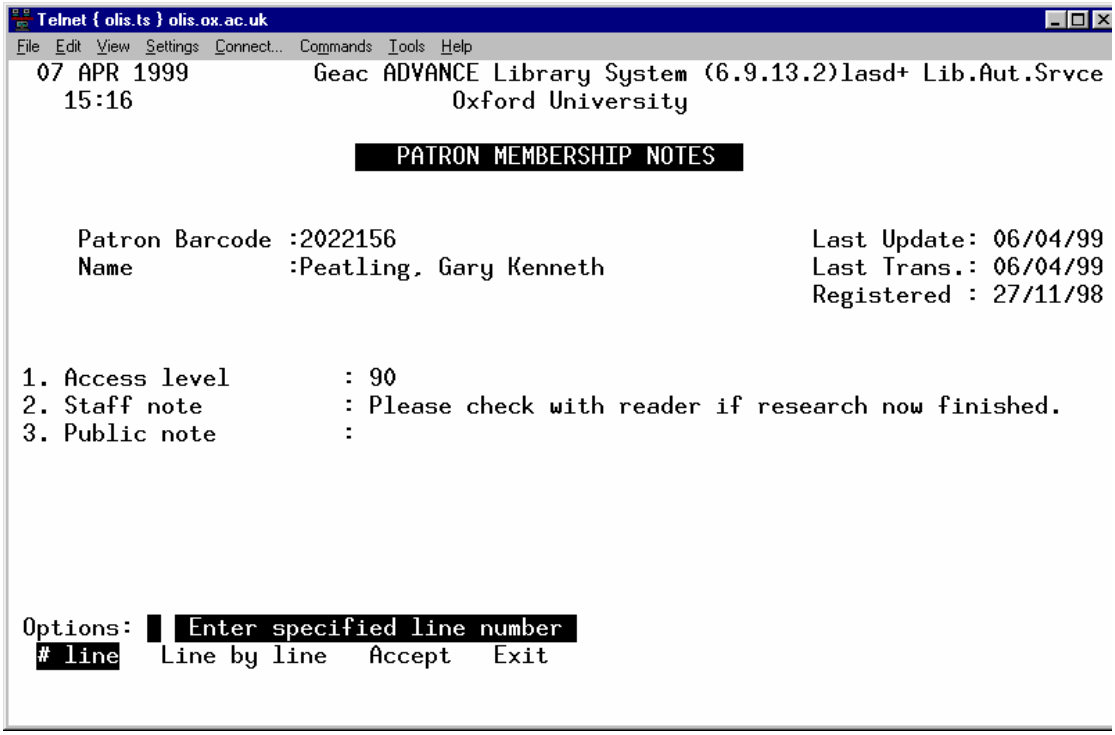
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
07 APR 1999 Geac ADVANCE Library System (6.9.13.2)lasd+ Lib.Aut.Srvce
15:16 Oxford University
PATRON MEMBERSHIP NOTES
Patron Barcode :2022156 Last Update: 06/04/99
Name :Peatling, Gary Kenneth Last Trans.: 06/04/99
Registered : 27/11/98
1. Access level : 90
2. Staff note : Please check with reader if research now finished.
3. Public note :
Options: Enter specified line number
line Line by line Accept Exit

Fig. 2.8: Patron Membership Notes screen

Any entry in field 2 in this Patron Membership Notes screen will be identical to that field 9 in the Patron Membership Registration screen. You can thus use this field to edit and add notes which will be visible to staff in your library, but not to staff in other libraries or to the reader.

Any entry in field 3 in this Patron Membership Notes screen will be identical to that field 8 in the Patron Membership Registration screen. You can thus use this field to edit and add notes which will be visible the reader and to staff in your library.

To access either of these fields type the appropriate line number and press **<Return>**. An editing window will appear. Type **<Esc>** and then **<e>** to exit the window once you have finished making any changes. The editing window is practically unlimited in size, but bear in mind that only one line will appear on this screen when you leave the window. If there is further text in this field which is not visible on the first line, a plus sign (+) will display at the end of the line.

Choose **Accept** and press **<Return>,** and then **File** and **<Return>** at the CPR first screen to save your changes.

Registering a lost card

If a reader reports to you that they have lost a University or other library card, it is necessary from the point of view of security to add a block to their reader record on OLIS. This will ensure that the card cannot be used by any one who finds it to borrow books from any OLIS circulation library in the name of the card owner.

This section describes the easiest way of adding a Lost Card block. Other ways of adding/editing/deleting blocks, and other types of patron block, are discussed below ch.6a.

Step 1

Type or select the option for **CTU** from any menu in the circulation module and press **<Return>**. The following prompt will appear:

```
Enter Patron name or barcode :
```

Step 2

Locate the borrower from the OLIS patron file. In this situation it will probably be necessary to do this by typing in their name (in the format *surname, forename*). This will bring up a browse list of those readers' names in the OLIS patron file alphabetically closest to the term you have entered. Once you have located the current borrower in this list, type in the appropriate line number and press **<Return>**.

If the reader has any blocks against their record at your library, these will then display; please proceed to Step 3. If no blocks are present, the following prompt will display:

```
No Block Record present. Do you want to enter a block? (Y/N)
```

Type **y** and press **<Return>**. A screen similar to the following will appear:

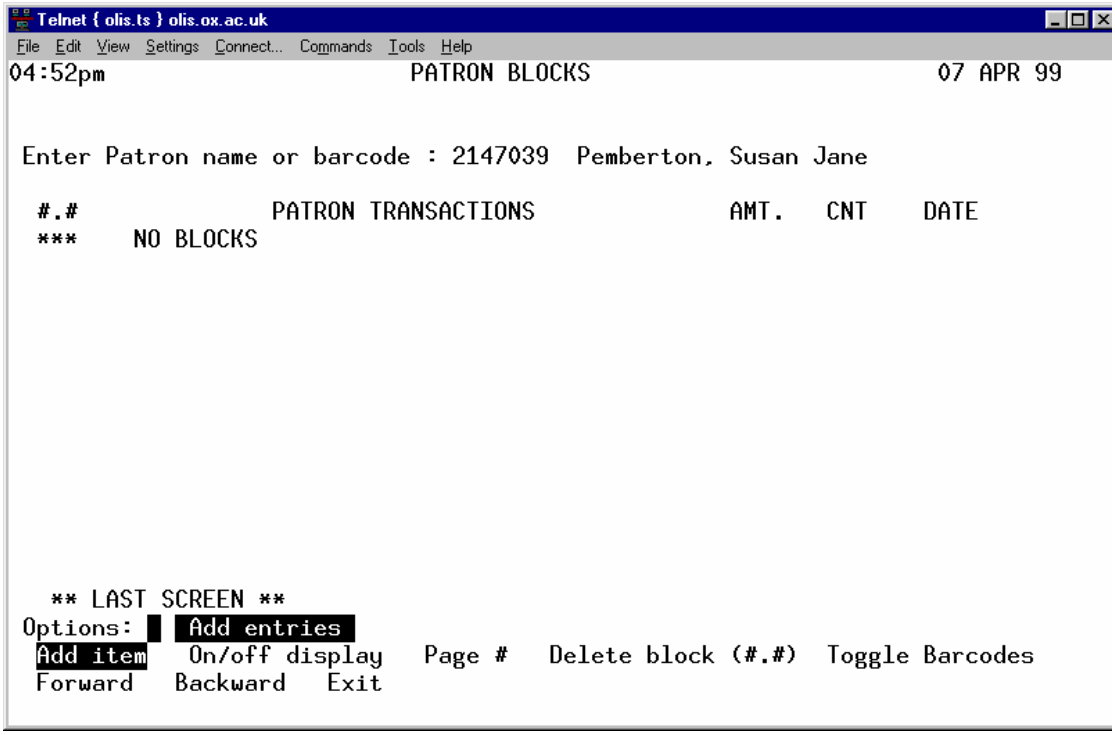
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
04:52pm PATRON BLOCKS 07 APR 99
Enter Patron name or barcode : 2147039 Pemberton, Susan Jane
#.# PATRON TRANSACTIONS AMT. CNT DATE
*** NO BLOCKS
** LAST SCREEN **
Options: Add entries
Add item On/off display Page # Delete block (#.#) Toggle Barcodes
Forward Backward Exit

Fig. 2.9: Patron Blocks screen (no blocks)

Step 3

Select the **Add item** option and press **<Return>**. The following prompt will appear:

Enter block type code :

If you know the block code (in this case, **30**) you may type it in here and press **<Return>**, then proceed to step 4. Alternatively you may type a double **??** and press **<Return>** at this point to see a list of possible block codes. This list will appear similar to the following:

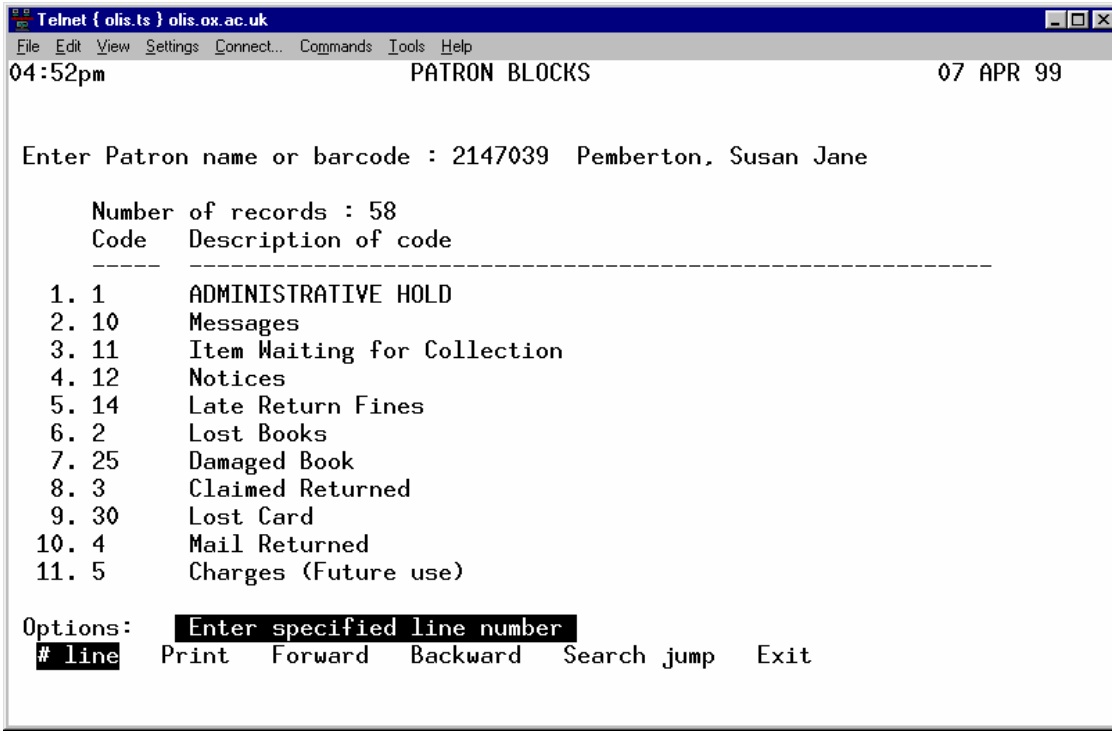
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
04:52pm PATRON BLOCKS 07 APR 99
Enter Patron name or barcode : 2147039 Pemberton, Susan Jane
Number of records : 58
Code Description of code
1. 1 ADMINISTRATIVE HOLD
2. 10 Messages
3. 11 Item Waiting for Collection
4. 12 Notices
5. 14 Late Return Fines
6. 2 Lost Books
7. 25 Damaged Book
8. 3 Claimed Returned
9. 30 Lost Card
10. 4 Mail Returned
11. 5 Charges (Future use)
Options: Enter specified line number
line Print Forward Backward Search jump Exit

Fig. 2.10: Patron Blocks table

Step 3

Type the line number (*not* the code) for the **Lost Card** option (*currently* no. **9**) and press **<Return>** to select the lost card block.

Step 4

The following prompt will appear:

```
Enter Item Barcode or Block description :
** Lost Card
_____________
```

It is necessary to enter something at this point or the block will not be placed. We recommend that you enter the date here (and anything else you wish to record about the lost card) and press **<Return>**.

A screen similar to the following will appear:

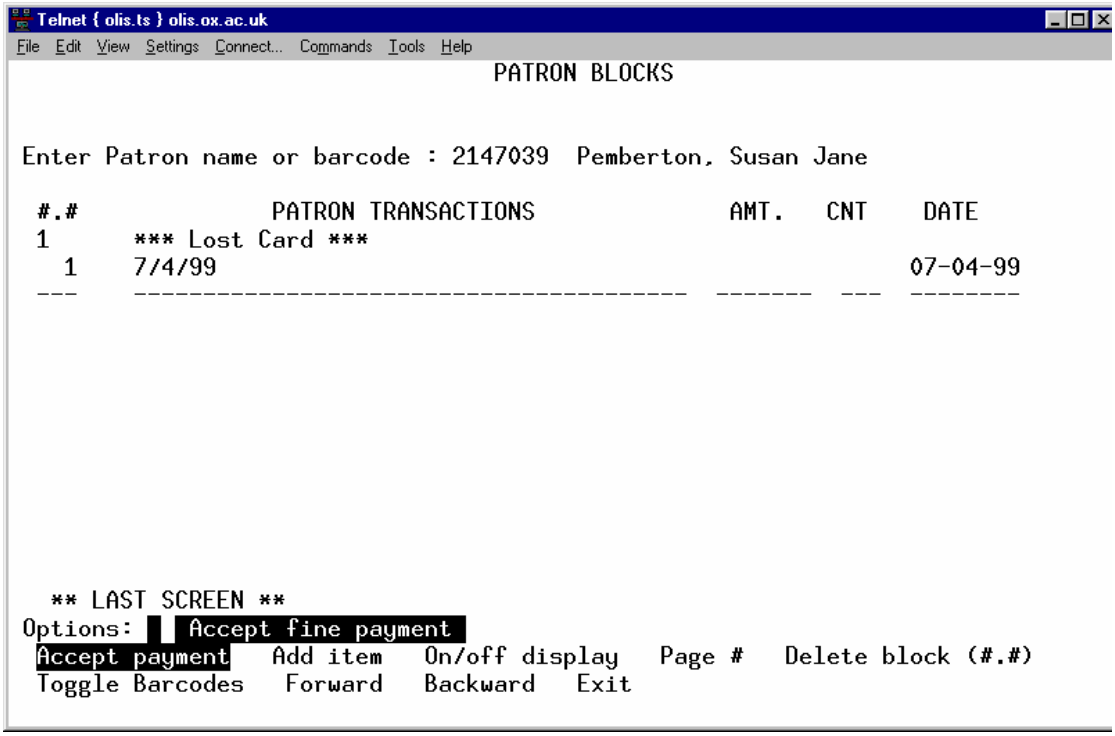
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
PATRON BLOCKS
Enter Patron name or barcode : 2147039 Pemberton, Susan Jane
#.# PATRON TRANSACTIONS AMT. CNT DATE
1 *** Lost Card ***
1 7/4/99 07-04-99
** LAST SCREEN **
Options: Accept fine payment
Accept payment Add item On/off display Page # Delete block (#.#)
Toggle Barcodes Forward Backward Exit

Fig. 2.11: Patron Blocks screen with Lost Card block

Step 5

Select the **Exit** option and press <**Return**>.

You have now added the block and it will not be possible to borrow using the card in any library in Oxford. If the barcode number is entered at check out at any circulation desk PC in Oxford, the following message will appear:

This patron card has been marked as lost and cannot be used in the library. Please press <ENTER>.

Found cards

In the event of the reader reporting that they have the found the card again without their needing to obtain a replacement, it will be *possible* for a library which has placed a lost card block to delete that block, thus making it possible for the reader to use that card again to borrow from OLIS circulation libraries. However, clearly, it would be advisable in such circumstances only to delete a lost card block if you are **sure** that the reader reporting having found the card is the original card owner. For this reason it is *not* possible for a library other than that which added the lost card block to delete it.

To delete a lost card block in this way, please use the following guidelines.

Step 1

Type or select the option for **CTU** from any menu in the circulation module and press **<Return>**.

Step 2

At the prompt:

Enter Patron name or barcode :

wand in the barcode of the recovered card. A screen similar to the following will appear:

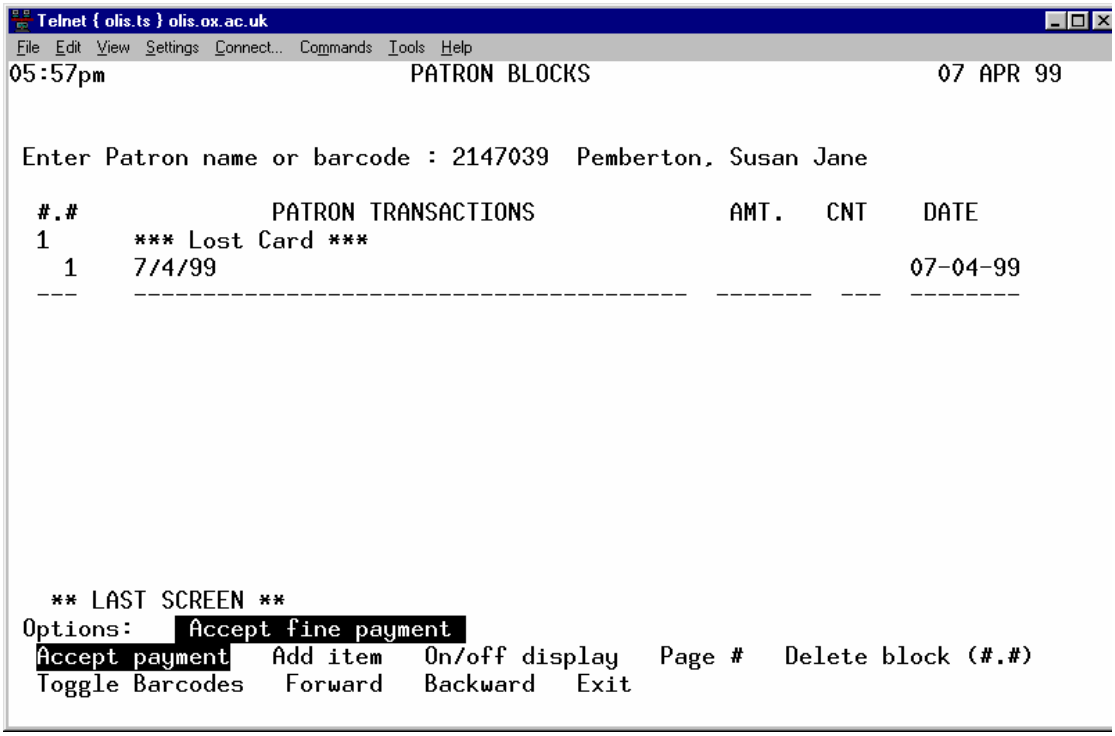
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
05:57pm PATRON BLOCKS 07 APR 99
Enter Patron name or barcode : 2147039 Pemberton, Susan Jane
#.# PATRON TRANSACTIONS AMT. CNT DATE
1 *** Lost Card ***
1 7/4/99 07-04-99
** LAST SCREEN **
Options: Accept fine payment
Accept payment Add item On/off display Page # Delete block (#.#)
Toggle Barcodes Forward Backward Exit

Fig. 2.12: Patron Blocks screen with Lost Card block

Step 3

Highlight the option **Delete block (#.#)**. Type the number of the block you wish to delete in the format **#.#** using the two digits to the left of the lost card block. NB: If this is the only block in the patron blocks screen (as in the screen dump above), you should type **1.1**: if there are other blocks in this screen, however, you may have to type different digits. Then press **<Return>**.

The block should now be removed from the screen and the reader should now be able to borrow from any OLIS circulation library of which they are a member using the recovered card.

Replacement Cards

If the reader is unable to find their card, they will have to obtain a replacement (depending on the category of card they need to replace, either a replacement

University card, which can be obtained through Bodleian Admissions, or a replacement library card direct from the library which is issuing them). When they first attempt to borrow from an OLIS circulation library using such a new card, it will be necessary for staff to use the **Update barcode** function from the CPR first screen to assign the new barcode number to them and enable them to borrow.

Update Barcode: Assigning New Barcodes

Step 1

Type or select the option for **CPR** from any menu in the circulation module and press **<Return>**.

Step 2

At the prompt

```
Enter Patron Name or Barcode:
```

enter the name (in the format *surname, forename*) or old reader number (i.e., not the number on the new University or library card) and press **<Return>** to retrieve the borrower record. The system will either go directly to the borrower record (if a barcode is entered) or to a borrower browse list (if a name was entered). In the latter case, locate the current borrower, type in the line number and press **<Return>** and the first Patron Registration screen will appear.

Step 3

Select the option **Update barcode** and press **<Return>**. At the prompt.

```
Current Patron Barcode..: 2147039 Pemberton, Susan
Enter new patron barcode:
```

Wand in the barcode from the new university or other library card. The new barcode will be linked to the patron record.

[NB: If you do not want to assign a new physical barcode to the reader at this time, just press **<Return>** at the above "Enter new patron barcode:" prompt and the system will automatically assign a negative barcode number (for example, -106615) to the reader. The reader's patron record must be retrieved and their barcode updated again to a physical barcode before they will be able to check items out.]

Updating a reader's barcode in this way will automatically delete any lost card block that they had attached to their patron record (so that they will be able to borrow again) *so long as* the lost card block was added in your library. If there is a lost card block attached to the record which was added in another OLIS circulation library from which the reader is able to borrow, this will **not** be automatically removed even when you update the barcode, since the two records become linked together on the system - this block will have to be removed at source before the reader can borrow using their new card. Please contact LAS for assistance if problems arise in removing lost card blocks.

Please note that when the Update barcode function is used, the reader's password for using the OLIS circulation patron functions is *not* automatically updated. If it is the case that the reader's password has been the same as their University (or other library) card barcode, and they wish the two to remain identical, it may be convenient to change this password (field 14 in first screen CPR - see 1.14 above) at the point of using the Update barcode function. However, readers should be encouraged for security reasons subsequently to change their password from this default themselves.

When an old barcode (i.e., one which has been updated) is entered at check out, the following message displays:

```
NEW ID = 2134624   Jebb, Keith B.
Please press <ENTER> for new ID or (E)xit :
```

Although it is possible to access the reader's record at this point, as the usual circumstances in which a reader's barcode number is updated is if a card has been lost, we strongly recommend that items should not be checked out to readers using old cards. Instead, you are advised to type **E** to exit the record and to ask the reader for their new card.

Other Options available from the Patron Registration first screen

Deleting a Borrower from the Database

If you wish to remove a borrower's privileges to borrow in your library, this is possible simply by deleting the reader's membership for your library (see Circulation Set Up Manual, H.8-11)

However if you know that a reader is deceased, or has left Oxford altogether, it is possible to delete a borrower record from the OLIS patron file. This may help to keep the patron registration file up to date, but you are under no obligation to do this. You may also wish to use this delete function if a duplicate record has erroneously been created by staff in your library (bear in mind that you can only delete such a record if you have previously attached a membership to it).

To delete such a patron record, select the delete option from the Patron Registration first screen and press **<Return>**. All attached memberships must be deleted before any individual borrower record may be completely deleted. See 1.24 above, and the Circulation Set Up Manual, H.8-11, if you wish to delete readers' memberships for your library - do not confuse this process of deleting a reader's membership at your library with the process of deleting their entire registration from OLIS. If the borrower is still registered in any OLIS circulation library and you try to delete their registration, the following warning message will appear:

```
All memberships must be deleted first.  Press <Return>.
```

If no memberships exist, then the following check message will appear:

Are you sure you want to DELETE this record (Y/N)?

Type **Y** and press **<Return>** to delete the record permanently.

Item list

Selecting the **Item list** option from the first CPR screen and pressing **<Return>** displays a list of items currently checked out (or lost) in the name of the borrower in your library. It is not possible at this point to use the function made available through accessing the reader's item list at check out (i.e., renew items, flag items as lost or claimed returned, add notes and access full checkout details; see 3.26-7, 4.13-5, 11-2, 7-9 below). Information is available here for display only as to the status of the borrowers' current loans. Similarly, the **Line #** option within the Item List will allow you to display the piece record for any item checked out to a reader, but you will not be able to update any cataloguing information here.

An **Item list** display facility similar to the one offered through the CPR screen is available to readers when they make an OPAC borrower enquiry, although they may be able to renew items they have out on loan here if this is permitted in your library (see the Readers Pocket Reference Guide 3, in leaflet form or at http://www.lib.ox.ac.uk/olis/rpr3/index.htm on how OPAC renewals may be performed). See Circulation Set Up Manual 8a.17-23 on how OPAC renewals may be controlled.

If you select this option when the reader does not have any items on loan from your library, the following message will display:

This patron does not have any items checked out!! Press <ENTER> :

Blocks display

This option will display if the reader has any blocks against their patron record. See ch.6a on blocks.

Pay charges/Waive charges

These options will display if the reader has any outstanding fines against their record, and could be used to waive or pay off such fines. Please see 6.19-21 below on fines.

Borrower History

You can maintain a history or list of items that have been borrowed by any borrower in your library. These lists can be displayed through the *Borrower History Display* (CHBD) option.

Ð **NB** The system keeps track of these items only if the Housebound field in the borrower's registration (CPR first screen field 17) is completed with Y for Yes. As by default Y will be entered in this field, do **not** change this field during the process of borrower registration if you wish such lists to be maintained.

Viewing the borrower history

Step 1

Type **CHBD** and press **<Return>** from any menu screen in the Circulation module and the Housebound Patron History Display screen will appear.

Step 2

At the prompt:

Enter Patron Name or Barcode:

wand in the reader's barcode or type in their name (in the format *surname, forename*) or **LST** (to retrieve the last patron accessed from any screen in the circulation module) and press **<Return>**. If you enter a name, a browse list will appear from which you will be able to select the reader: otherwise you should be taken straight to the borrower record.

If the borrower does not have a membership in your library, the following message will display:

Patron is not registered at this location

Press **<Return>**, and then select **Exit** and press **<Return>** again to go back to the borrower prompt.

If the borrower has a membership but has not checked an item out from your library since their borrower history was last cleared, the following message will display:

No checkout history for patron, press <return> :

Press **<Return>** to go back to the borrower prompt.

If you do identify a borrower with a stored history, the system displays the *Housebound Patron Checkout History* screen, listing the items borrowed by the reader since they were registered, or since the list was last cleared.

A screen similar to that overleaf will appear:

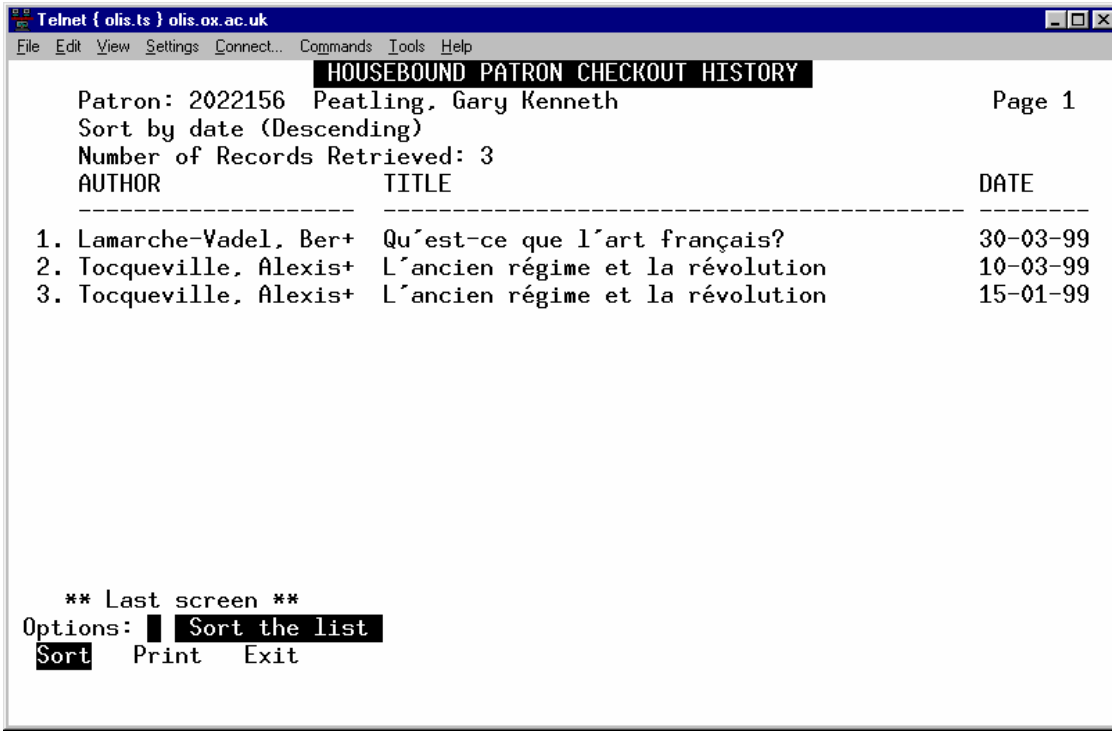
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
HOUSEBOUND PATRON CHECKOUT HISTORY
Patron: 2022156 Peatling, Gary Kenneth
Page 1
Sort by date (Descending)
Number of Records Retrieved: 3
AUTHOR
TITLE
DATE
1. Lamarche-Vadel, Ber+ Qu'est-ce que l'art français? 30-03-99
2. Tocqueville, Alexis+ L'ancien régime et la révolution 10-03-99
3. Tocqueville, Alexis+ L'ancien régime et la révolution 15-01-99
** Last screen **
Options:
Sort the list
Sort Print Exit

Fig. 2.13: Borrower History Display

If the list goes onto (a) further screen(s), a **Forward** option will appear on the option bar.

Step 3

By default, the list of items checked out by the reader will appear sorted by descending order of checkout date (i.e., with the item most recently checked out at the top). Note that renewals will *not* appear separately in this list. The **Sort** option can be used to change the display sequence. Choose **Sort** and press **<Return>**.

The following prompt will appear:

Sort the list by <A>uthor/<T>itle/<S>ubject/<D>ate (Descending) :

Choose an option by selecting the first letter of the word.
Type **a** and press **<Return>** to see the list sorted by alphabetical order of author.
Type **t** and press **<Return>** to see the list sorted by alphabetical order of title.
Type **s** and press **<Return>** to see the list sorted by alphabetical order of the first subject heading of each item. This subject heading will appear in place of the title if you select this sorting option.
Type **d** and press **<Return>** to revert to the default sequence.

Printing the borrower history

NB: Please note that by default printing within ADVANCE is **not** set to appear on a printer in your library, but at LAS. If you require regularly to print off borrower histories, please contact LAS and we can arrange for such reports to print off in your library.

Step 1

Use the **Print** option and press **<Return>** to print the current displayed list (it will print in the sorted sequence which you currently have on screen). The following message will appear:

```
Please type in a heading you would like on the printout. This will identify the printout
as being yours...
Enter your name/heading :
```

Step 2

Enter a heading for the report and press **<Return>**. Press **<Return>** again to send the report to the system printer, or select **Exit** and **<Return>** to exit without printing. If your printer has been configured to print in landscape format, the report can display the author, title, subject information and checkout date for the borrower's complete list. If the report prints in portrait format, it will display such details as will fit onto each line.

Housebound History Clear

It is possible to clear all or part of this borrower history display for individual borrowers or all of your borrowers using a *Housebound Patron History Clear* function. When this is used, the past borrowing of affected readers up to a specified will no longer be stored on OLIS. You should be warned that it may be found useful to refer to these lists, e.g., in the event of a dispute with one of your readers as to whether they actually have borrowed a missing or damaged book. It is therefore up to each library's discretion as to when lists are cleared: the frequency with which it is run is likely to be inversely proportional to the lengths of your loan period. The procedure is described in the Circulation Set Up Manual, appendix H.11-6. Note that you will only be able to access this function using you personal userID, and if you have sufficient permissions in OLIS circulation: at least one person in your library will have sufficient permissions. Please contact LAS if you require regular access to this *Housebound Patron History Clear* function.

The borrower history of a reader will automatically be deleted if their membership is deleted.

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Check out

Introduction

This chapter describes the basic procedure for the check out and renewal of items to readers. Guidelines on how certain settings (e.g., the due date of items) can be changed at check out are included. There is also a guide on how to deal with the error messages and exceptions which can appear when you are trying to check an item out to a reader, including the procedure for checking an item out which has not previously been catalogued.

The following chapter (four) will describe how other functions may be accessed through check out.

Basic Check out

Step 1

If you are not already at the checkout screen, select the option for or type **cout** from any menu in the circulation module and press **<Return>**. The following prompt (the *checkout borrower prompt*) will appear:

```
Enter Patron Name or Barcode:
```

Step 2

Enter the borrower's barcode either by wanding with a barcode reader, or by typing it in manually and pressing **<Return>**.
NB: Although it is possible to use alternative methods to retrieve a borrower's record at COUT (see below 3.5) we do not advise you to check items out to readers through OLIS circulation unless they present a valid University (or other library) card at your circulation desk.

A screen similar to the following will appear:

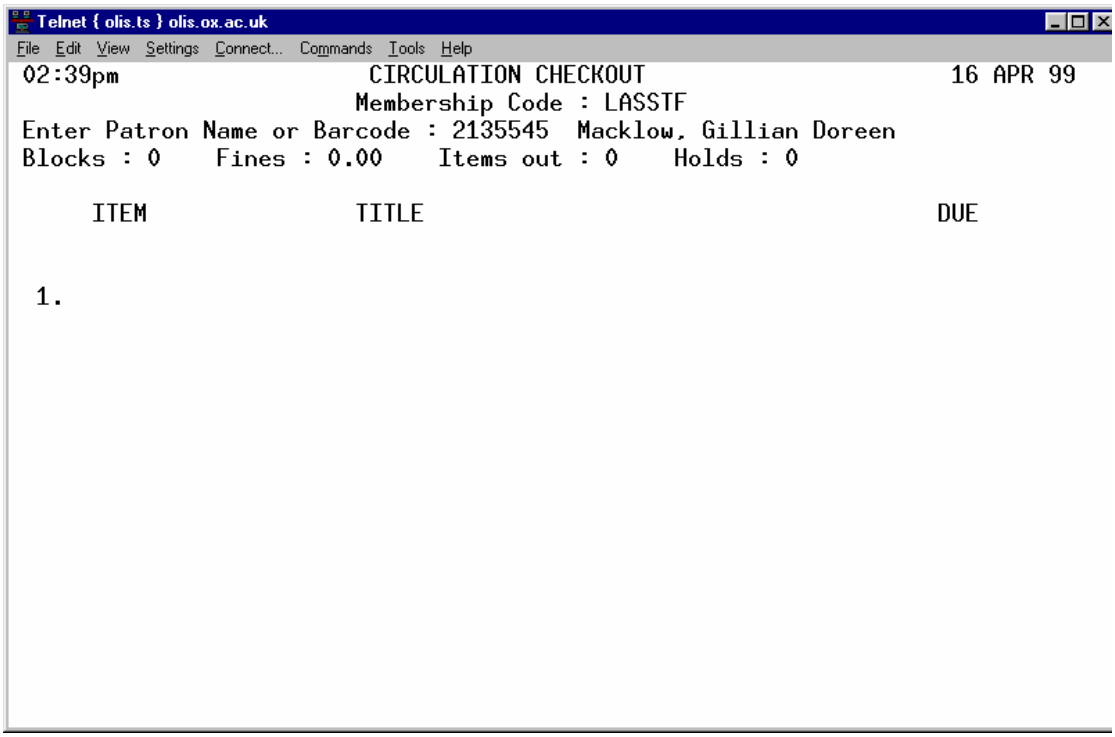
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
02:39pm CIRCULATION CHECKOUT 16 APR 99
Membership Code : LASSTF
Enter Patron Name or Barcode : 2135545 Macklow, Gillian Doreen
Blocks : 0 Fines : 0.00 Items out : 0 Holds : 0
ITEM TITLE DUE
1.

Fig. 3.1: Checkout screen with borrower selected

The cursor will appear at the *item prompt* (i.e., in the column headed ITEM).

Step 3

Wand in an item barcode and press **<Return>**. The Due date and time and (depending on the screen set up) possibly also the title will automatically appear to the right of the item barcode .

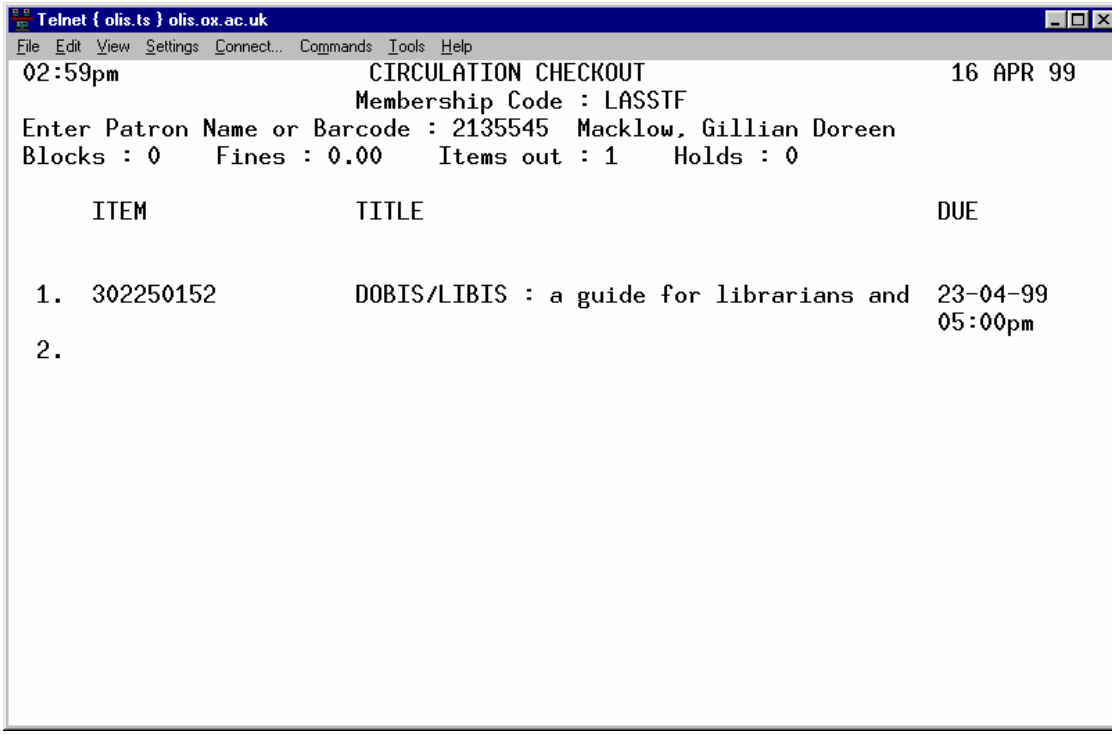
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
02:59pm CIRCULATION CHECKOUT 16 APR 99
Membership Code : LASSTF
Enter Patron Name or Barcode : 2135545 Macklow, Gillian Doreen
Blocks : 0 Fines : 0.00 Items out : 1 Holds : 0
ITEM TITLE DUE
1. 302250152 DOBIS/LIBIS : a guide for librarians and 23-04-99 05:00pm
2.

Fig. 3.2: Checkout screen: check out of item complete

The cursor will appear at the item prompt on the next line, ready for you to wand in the next item barcode if there are further items to check out to the same reader.

Step 4

Repeat this procedure with all items to be checked out to this reader. When finished, simply press **<Return>** at the item prompt to go back to the prompt:

Enter Patron Name or Barcode:

From here you may retrieve a different borrower record in order to check items out to a different reader. If you wish to access a different function in circulation, press **<Return>** once more to go back to a circulation menu.

NB: The due dates and times calculated for items and displayed in the checkout screen when items are checked out are based on the parameters completed in your library's circulation set-up. If you find that different due dates and times are being calculated from those you anticipated, please:

- Check the matrix first screen for the circulation code/patron membership combination(s) concerned (see Circulation Set Up Manual ch.8, especially 8.19-20).
- Check any current periods entered in the Special Loans screen of the matrix for the circulation code/patron membership combination(s) concerned (see Circulation Set Up Manual, 8a.2-17).
- Especially if all checkout transactions at your library are producing curious results, check your library's circulation calendar (see Circulation Set Up Manual ch.1).

Retrieving borrowers at Check out

At the checkout borrower prompt:

Enter Patron Name or Barcode.

you will find that you mostly use the barcode from readers' University (or other library) cards to retrieve borrower records. We do not advise that you check items out to a reader unless (s)he can present a valid University (or other library) card at your circulation desk. However, there are other ways in which you can retrieve a borrower record at check out:

1) Enter borrower name

The borrower name may be entered in the format ***surname, forename***. You do not need to enter the whole name as a browse list of those patron names alphabetically closest to the term you enter will appear, so you only need to enter enough to enable you to access the correct part of this index (e.g., **peatl**, or **peatling g**). Then select the line number of the current borrower from the browse list and press **<Return>**.

2) LST

You may retrieve the last borrower record accessed anywhere in the circulation module (*within the current ADVANCE session*) by typing **lst** and pressing **<Return>**.

3) Enter ID = patron personal ID

If an ID number has been entered in field 7 of a reader's first patron registration screen, this can be used to retrieve the borrower record at the checkout borrower prompt. Type **ID=** followed by the reader's ID number, then press **<Return>**.

Checkout session settings

At the checkout borrower prompt, i.e.,

Enter Patron Name or Barcode:

It is possible to use three commands which respectively will enable you to:

- Toggle between a detailed and simple display within the checkout screen.
- Enter a discretionary check out date and time to apply to items checked out during your checkout session
- Enter a discretionary due date and time to apply to items checked out during your checkout session

NB: Changes to any of these parameters will take effect throughout the current checkout session (i.e., until you have returned to a circulation menu) or until the settings are changed again. The default settings at check out are respectively:

- The detailed display
- For the current date and time to be used as the checkout date and time
- For the due date and time to be calculated using the data entered into the relevant parts of your library's matrix.

1) Detailed and simple display

Entering the command **dt** and pressing **<Return>** at the checkout borrower prompt will allow you to switch between a detailed checkout display including the title:

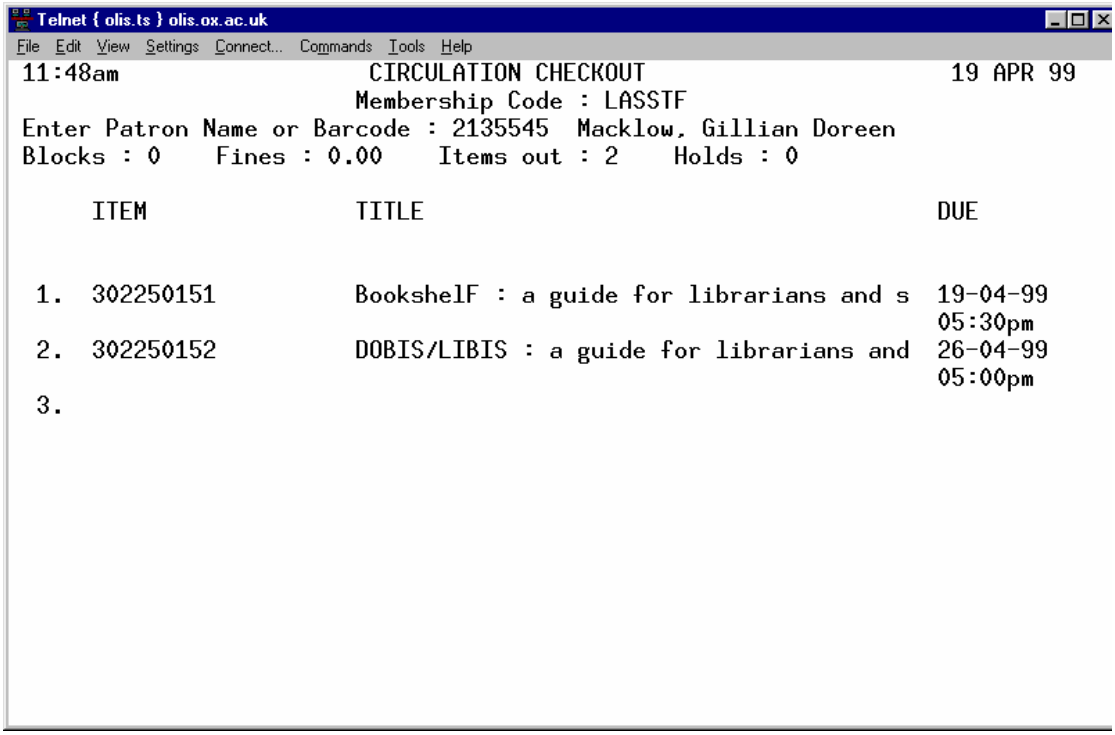
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
11:48am CIRCULATION CHECKOUT 19 APR 99
Membership Code : LASSTF
Enter Patron Name or Barcode : 2135545 Macklow, Gillian Doreen
Blocks : 0 Fines : 0.00 Items out : 2 Holds : 0
ITEM TITLE DUE
1. 302250151 BookshelF : a guide for librarians and s 19-04-99 05:30pm
2. 302250152 DOBIS/LIBIS : a guide for librarians and 26-04-99 05:00pm
3.

Fig. 3.3: Checkout screen detailed display

and a simple display including just the item barcode, and the due date and time:

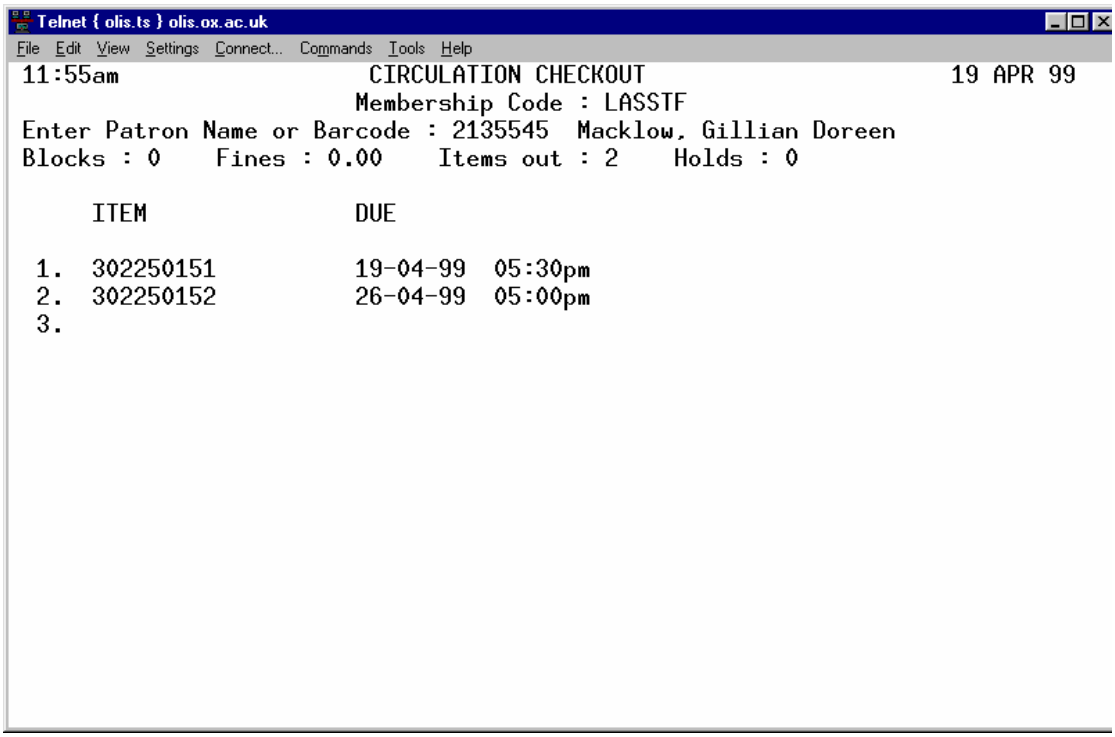
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
11:55am CIRCULATION CHECKOUT 19 APR 99
Membership Code : LASSTF
Enter Patron Name or Barcode : 2135545 Macklow, Gillian Doreen
Blocks : 0 Fines : 0.00 Items out : 2 Holds : 0
ITEM DUE
1. 302250151 19-04-99 05:30pm
2. 302250152 26-04-99 05:00pm
3.

Fig. 3.4: Checkout screen simple display

If you type the command **dt** and press **<Return>** at the checkout borrower prompt to change to a simple display at checkout, the following message will appear:

```
Checkout format changed to SIMPLE - Press <ENTER> to continue :
```

If you type the command **dt** and press **<Return>** at the checkout borrower prompt to change to a detailed display at check out, the following message will appear:

```
Checkout format changed to DETAILED - Press <ENTER> to continue :
```

2) Changing the checkout date and/or time for the whole checkout session

By default, the current date and time are used as the checkout date/time in determining the due date/time of items checked out. In the vast majority of checkout sessions, this default should be accepted. However, you may, on rare occasions, wish to use a different *checkout* date/time in checkout transactions, for instance to test that aspects of your circulation setup have been completed as desired, or in the event of problems with a circulation backup or self-issue upload from previous dates/periods. Use the following guidelines to specify such a different date/time.

At the checkout borrower prompt, if you type the command **cd** and press **<Return>**. The following prompt will appear:

```
Checkout Date :
```

Enter the date which you wish to be effective as the checkout date during this checkout session and press **<Return>**. The formats DD/MM/YY, DD.MM.YY, DD-MM-YY, etc. will all be accepted by the system at this point (as well as formats including four digits for the year), although there is no need to enter the year if you wish to use a date in the current year. If you are happy to use the current date at check out for the checkout session (i.e., if you only wish to use a *time* different from the default), just press **<Return>** at this prompt.

The prompt

```
Checkout Time :
```

will then appear. Enter the time which you wish to be effective during this checkout session in the format HHMM or HH:MM, and then press **<Return>**. If you are happy for the current time to be used (on whatever date you have entered previously), just press **<Return>**.

The date and/or time that you enter will display at the top of your checkout screen in brackets:

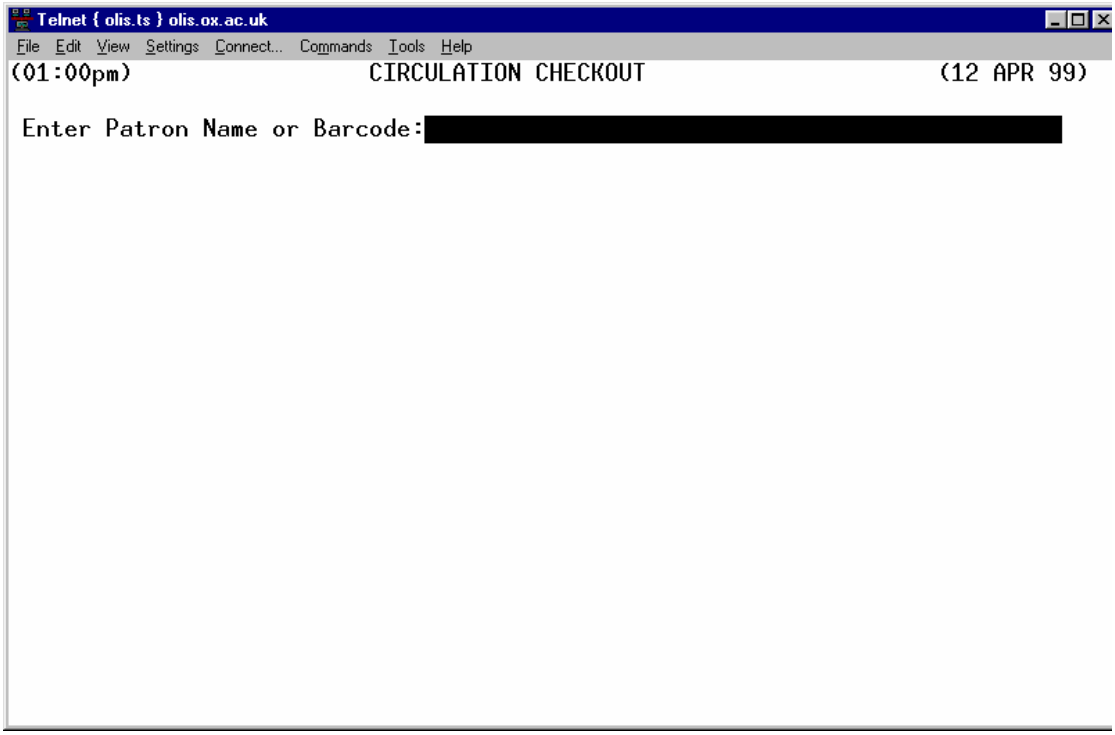
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
(01:00pm) CIRCULATION CHECKOUT (12 APR 99)
Enter Patron Name or Barcode:

Fig. 3.5: Checkout borrower prompt after **cd** function has been activated

Note that if you wish a different checkout date/time to apply for a single loan, rather than for an entire session, you should use the **cd** command *after* rather than before you retrieve a borrower at check out and before you enter the barcode of the item concerned (see below, 4.5).

If the **due** command (see below) is used to specify a due date/time for the session before the **cd** command has been used to alter the check out date and/or time, any check out date and/or time which you enter which is later than the entered due date/time will not be effective.

3) Changing the due date and time for the whole checkout session

By default, the current date and time, or any date and time you have specified to be used as the checkout date/time, are used as in conjunction with your library's setup tables to calculate the due date/time of items checked out. In the vast majority of checkout sessions, this default should be accepted. However, you may, on rare occasions, wish to use a specified *due* date and perhaps also time in checkout transactions, for instance in the event of special circumstances, or in the event of problems with a circulation backup or self-issue upload from previous dates/periods. Use the following guidelines to specify such a different date/time.

At the checkout borrower prompt, if you type the command **due** and press **<Return>**. The following prompt will appear:

```
Checkout Due Date :
```

Enter the date which you wish to be effective as the due date during this checkout session and press **<Return>**. The formats DD/MM/YY, DD.MM.YY,

DD-MM-YY, etc., will all be accepted by the system at this point (as well as formats including four digits for the year), although there is no need to enter the year if you wish to use a date in the current year.

The prompt

Checkout Due Time :

will then appear. Enter the time which you wish to be effective during this checkout session in the format HHMM or HH:MM, and then press **<Return>**. If you are happy for the default time to be used (on whatever date you have entered previously), just press **<Return>**. Please note that any due time you enter will **not** be used *unless* you have entered a due date at the previous prompt.

The date and/or time that you enter will display near the top of your checkout screen (beneath the borrower's details) once you have retrieved a borrower record:

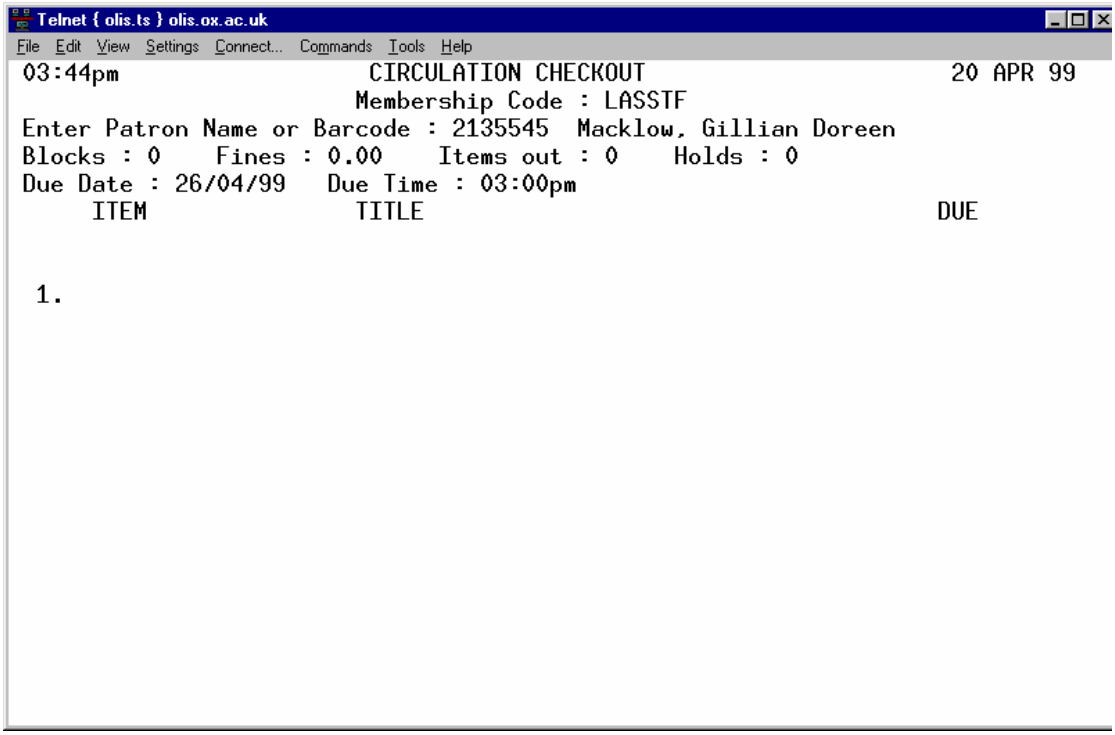
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
03:44pm CIRCULATION CHECKOUT 20 APR 99
Membership Code : LASSTF
Enter Patron Name or Barcode : 2135545 Macklow, Gillian Doreen
Blocks : 0 Fines : 0.00 Items out : 0 Holds : 0
Due Date : 26/04/99 Due Time : 03:00pm
ITEM TITLE DUE
1.

Fig. 3.6: Checkout screen after **due** function has been activated

Note that if you wish a different due date and time to apply to a single loan, rather than to an entire session, you should use the **due** command *after* rather than before you retrieve a borrower at check out and before you enter the barcode of the item concerned (see below, 4.5-6).

If the **cd** command (see above) is used to specify a check out date/time for the session before the **due** command has been used to alter the due date and time, you will not be able to enter a due date and time prior to the specified checkout date/time.

? for options

At the checkout borrower prompt, i.e.,

```
Enter Patron Name or Barcode:
```

you may type **?** to see a list of the options available at this point:

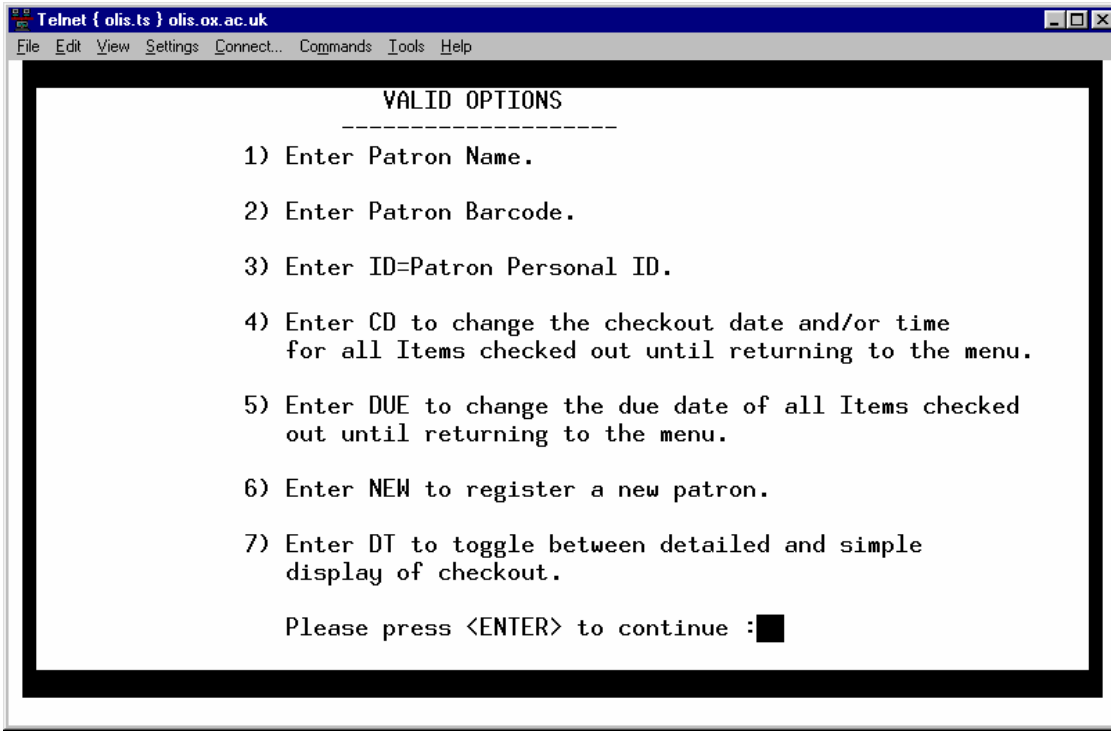
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
VALID OPTIONS
1) Enter Patron Name.
2) Enter Patron Barcode.
3) Enter ID=Patron Personal ID.
4) Enter CD to change the checkout date and/or time for all Items checked out until returning to the menu.
5) Enter DUE to change the due date of all Items checked out until returning to the menu.
6) Enter NEW to register a new patron.
7) Enter DT to toggle between detailed and simple display of checkout.
Please press <ENTER> to continue :

Fig. 3.7: List of valid commands at the checkout borrower prompt, displayed by entering **?**

Press return to go back to the checkout borrower prompt.

Error messages about the borrower

When you have retrieved a borrower record at check out, there are a variety of messages with which you may need to deal before you can check items out to them.

New ID

If a message such as the following displays when you wand in a reader's University (or other library) card at check out:

```
NEW ID = 2047317
Please press <ENTER> for new ID or (E)xit :
```

This indicates that the reader number you have entered has been updated on the system (see 2.18-9). Although it is possible to access the borrower record in these circumstances by pressing **<Return>** at this point, and subsequently to check items out to such a reader, for security reasons we strongly advise that instead you type **E** for Exit and press **<Return>** to go back to the checkout borrower prompt, and ask the reader to present their current card before checking any items out to them.

Lost card

If the following message appears when you wand in a borrower barcode at check out:

```
This patron card has been marked as lost
and cannot be used in the library. Please press <ENTER>.
```

It will not be possible to check items out to the reader. If you have just used the update barcode function to register a new card for the reader, please contact LAS and ask for assistance.

Patron's membership expired

If a message such as the following displays when you wand in a reader's University (or other library) card at check out:

```
Patron's local Membership (LASSTF) has expired.
Enter (P)atron update or <ENTER> to exit :
```

You will be unable to check out or renew items for the reader unless you first extend their expiry date. If you wish to enable the reader to borrow, type **p** and press **<Return>** to display the reader's borrower record. Type **10** and press **<Return>** to access the Expiration Date field, and then enter the new date. Press **<Return>** to go back to the option bar and then select **File** and press **<Return>** to save your changes. You will now be able to check out/renew items for the borrower.

Patron not registered

If the following message appears when you wand in a borrower barcode at check out:

```
Patron is not registered at this location
```

This indicates that the reader is not linked to a patron membership in your library. They must be given a membership to be able to borrow from your library. If you wish to be able to check items out to this reader, press **<Return>** twice to go back to a circulation menu. Select the option for or type **CPR** and press **<Return>**, then type **lst** and press **<Return>** to retrieve the borrower. Then use the guidelines on 1.17-22 (particularly the brief notes on 1.18-20) to give them a membership in your library. You can then go back into the checkout screen and again use the **lst** function to retrieve the borrower record and check out items to them.

Added Borrowers

If a borrower retrieved at check out has added borrowers, the added borrowers will be displayed at check out (on added borrowers see above 1.30-2). If you wish to loan to an added borrower on behalf of a registered borrow with whom they are associated, it is necessary to retrieve the registered borrower's record first.

A screen similar to the following will appear:

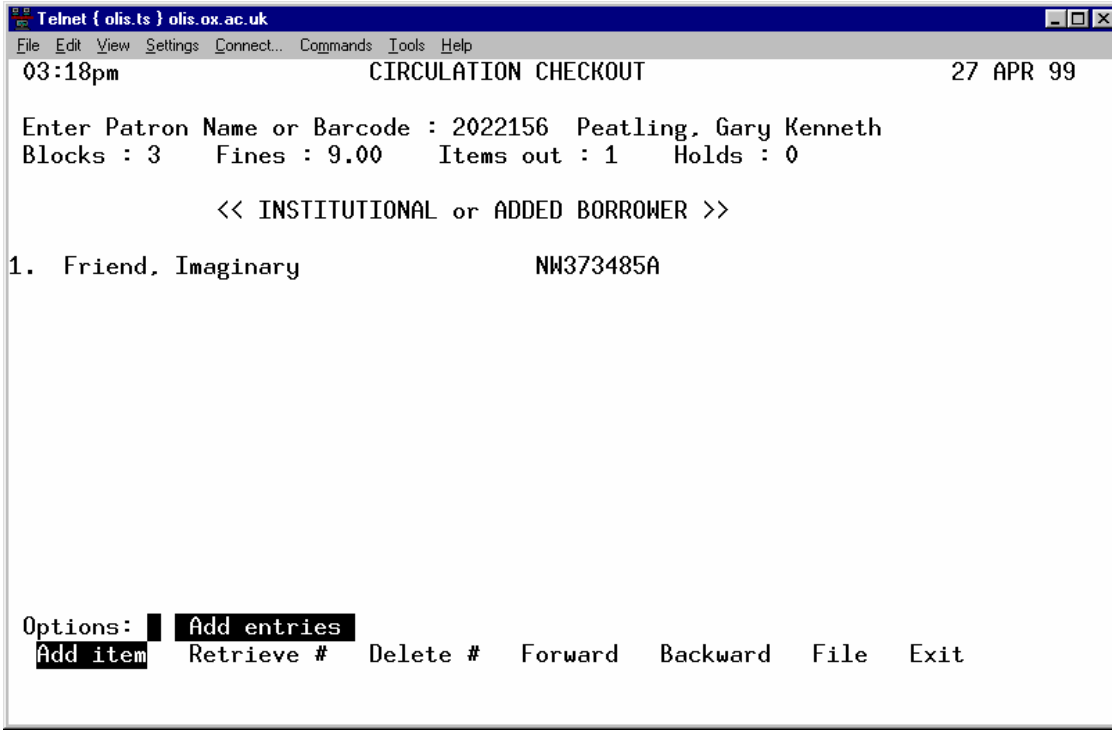

Fig. 3.8: Added borrower screen at check out

From here it is possible to add further added borrowers, delete existing ones, or check out or renew items on behalf of the registered borrower, either to the added borrower or to the registered borrower themselves (please see 4.15-7 above for details).

Patron blocks

If the reader has any blocks against their name, these will be displayed in the patron blocks screen (see Fig.3.9) when you wand in a reader's University (or other library) card at check out. Blocks contain information about a reader which it may be advantageous for staff to see when the reader is at the circulation desk, such as fines outstanding, items overdue, reserved items awaiting collection (see ch.6a below for further information about blocks):

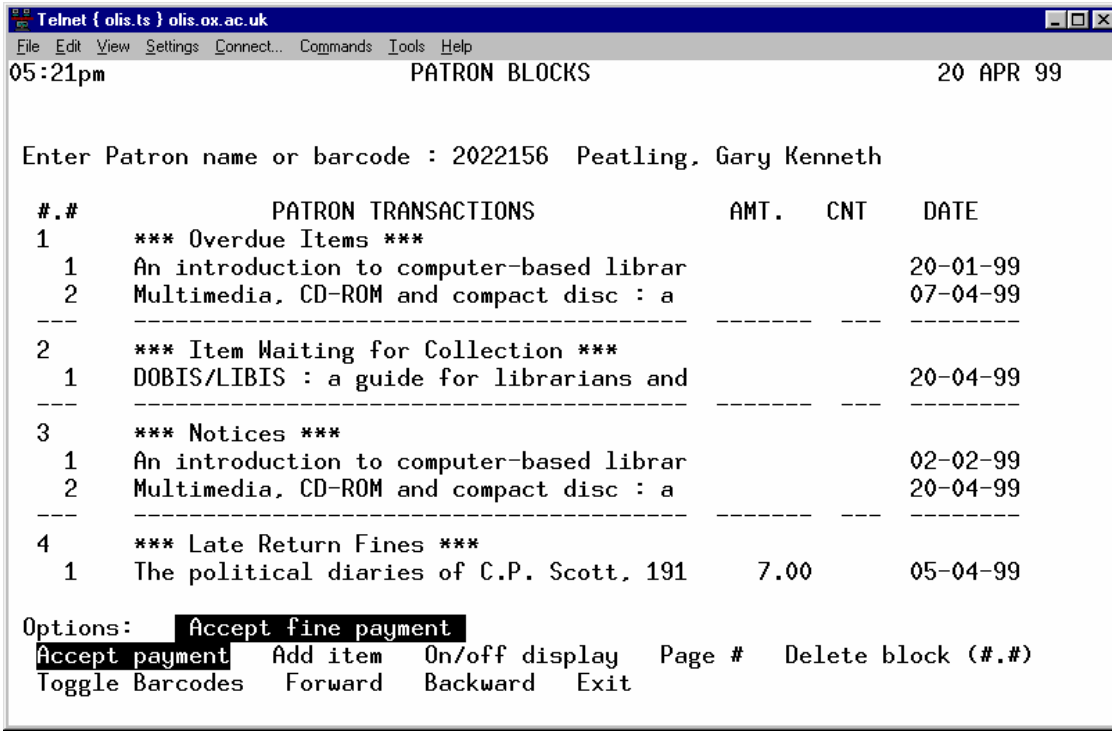
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
05:21pm PATRON BLOCKS 20 APR 99
Enter Patron name or barcode : 2022156 Peatling, Gary Kenneth
#.# PATRON TRANSACTIONS AMT. CNT DATE
1 *** Overdue Items ***
1 An introduction to computer-based librar 20-01-99
2 Multimedia, CD-ROM and compact disc : a 07-04-99
2 *** Item Waiting for Collection ***
1 DOBIS/LIBIS : a guide for librarians and 20-04-99
3 *** Notices ***
1 An introduction to computer-based librar 02-02-99
2 Multimedia, CD-ROM and compact disc : a 20-04-99
4 *** Late Return Fines ***
1 The political diaries of C.P. Scott, 191 7.00 05-04-99
Options: Accept fine payment
Accept payment Add item On/off display Page # Delete block (#.#)
Toggle Barcodes Forward Backward Exit

Fig. 3.9: Patron Blocks screen

You may want to act on any information contained here (e.g., check out an item awaiting collection), while the reader is at your circulation desk. Select **Exit** and press **<Return>** to continue with the current checkout transaction(s). It is possible to redisplay these blocks within the checkout screen at the item prompt, e.g., if you wish to remind yourself of the titles awaiting collection at any point (see below 4.10).

Administrative hold

If any of the blocks which displays at this point is an **administrative hold** block, the reader will have committed some misdemeanour in your library which incurs this block. (The occurrence of this block can be controlled by each library in its set up tables; see Circulation Set Up Manual 7.23). When you exit the blocks screen of such a reader, the following message will display.

This patron is on administrative hold. Do you wish to override? (Y/N) :

It is possible to type **Y** and to continue with the checkout transaction, but you will probably wish to type **N** to prevent further renewals/check outs by this reader until they have taken action to remove the administrative hold (see 6a.16-7 for further information on administrative holds).

Patron last updated

The message:

Patron record last updated on MM/DD/YY Please press <ENTER> : _____

will display if no data in the reader's membership screen for your library has been updated within a given period. It is possible to continue with the checkout transaction(s), simply by pressing **<Return>**. Occasional appearances of this

message may be found helpful in prompting staff to check whether the reader's details (e.g., addresses) have changed; but if the message is found intrusive and unnecessary, a high value should be entered in the *Frequency to check patron* field in CPMC second screen for appropriate patron membership(s) (see Circulation Set Up Manual 7.15).

Borrower Status Line

The checkout screen will display the checkout time and date which will be used in the next transaction (i.e., the current date and time unless you have specified that a different date and time should be used - see above, 3.7-8), the reader's name, barcode and patron membership, and a status line. This line indicates:

- How many blocks the reader currently has in your library
- The total of any outstanding fines that the reader currently owes to your library
- How many items the reader currently has out on loan from your library.
- How many holds are currently placed in the reader's name *anywhere on the system*.

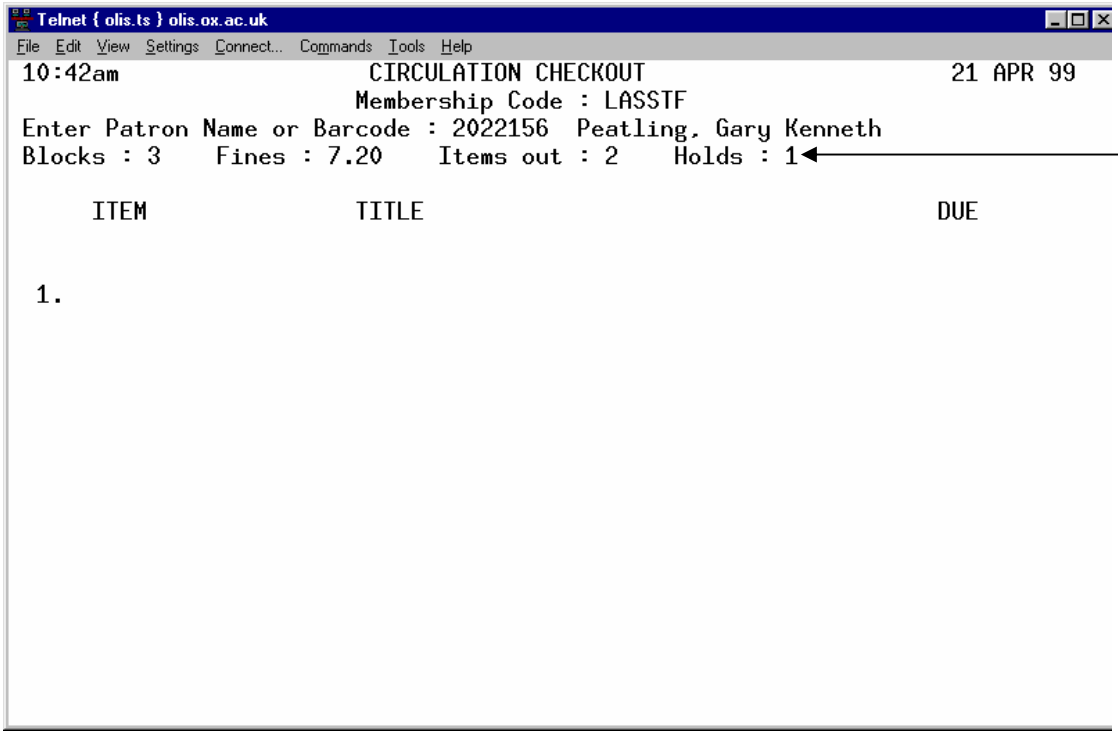
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
10:42am CIRCULATION CHECKOUT 21 APR 99
Membership Code : LASSTF
Enter Patron Name or Barcode : 2022156 Peatling, Gary Kenneth
Blocks : 3 Fines : 7.20 Items out : 2 Holds : 1
ITEM TITLE DUE
1.
Borrower Status Line

Fig. 3.10: Borrower Status Line on Checkout screen

To access further information about any of these aspects of the borrower's record, use the command **b** to display blocks information, **ap** to display the borrower's fine screen, **it** to display information about the items they have checked out, or **h** to display the borrower's holds screen (please see 4.7-10, 12 below for further information about these commands).

Checkout messages and exceptions

There are a number of exceptions (and associated messages) that may arise when items are checked out. The most important are described below:

Item already checked out

If staff attempt to check out an item which according to OLIS is already on loan to another reader, the following message will display:

```
The item "3xxxxxxxx" has already been checked out.
```

This may happen if there has been some error by staff or on the system when the item was returned by the previous reader, or if problems arose when self-issue data was uploaded. As the item clearly will have been returned, you will probably wish to check the item in so that it can be loaned to the current reader. To do this press **<Return>** to go back to the item prompt, then type **in** and press **<Return>** to check the item in as normal (you will probably also wish to waive any fines which the system calculates for the previous reader in the process of checkin; see 6.7-8 on waiving fines). The previous borrower's name will be displayed at the checkin screen (see 5.3-4) and it will then be possible to loan the item to the current reader.

However, if for any reason you should wish to find out the identity of the previous borrower of the item without checking the item in, this can be accessed by pressing **<Return>** twice, selecting (or keying in) **CEH** at a circulation menu, and wanding in the barcode (see Appendix B below).

Checked out to current borrower

When a borrower tries to check out an item that is already checked out to themselves, OLIS will assume that the transaction is a renewal, but will prompt for confirmation. A message similar to the following will display:

```
This item is currently checked out to this patron on 21 APR 99 at 11:13
     Renew Item (Y/N/yes to All) ?
```

Type **y** and press **<Return>** to renew this particular item. Assuming that renewal for loans such as the current one has been permitted in your library's setup tables, the system will calculate and display a new due date and time for the item.
If you type **a** and press **<Return>**, the current item will again be renewed where possible. However, typing **a** also indicates to OLIS that further items will be renewed for this reader in this checkout session, so that if and when further such renewals are made, the above prompt will not display.

Answering **n** and pressing **<Return>** or just pressing **<Return>** produces no changes to any conditions associated with the item (i.e., it will still be out on loan to the current reader with the former due date). The cursor will go back to the item prompt.

Please see 3.24-30 below for further information about renewals.

Overdue item

When a borrower tries to check out an item that is already on loan to them *and* overdue, a prompt similar to the following will display:

This item is OVERDUE and must be checked in. Checkin and Renew ? (Y/N) :

Type **y** and press **<Return>** to check in and renew the item. If renewal is possible for the loan, the checkin screen will first be displayed, and any outstanding fines (including overdue charges associated with this particular item) will be calculated and displayed at this point, and payment or waiving may be registered (see above 6.5-10). The checkout screen will then be redisplayed, and the new due date/time for the item will be shown.

Please see 3.24-30 below for further information about renewals.

Checkout limits exceeded

Two limits may be set on the numbers of items a reader can check out:

1. a maximum number of items a reader can check out in an uninterrupted checkout session (i.e., without going back to the borrower prompt or without another reader appearing at check out).
2. a maximum number of items in a reader's possession at any one time.

In both cases there is:

A, a limit specific to a reader's borrowing of items from one circulation code. These are set when the circulation code and patron membership concerned are linked in the matrix (see Circulation Set Up Manual, 8.23-4).

B, a generic limit on a reader's total borrowing of items from your library from any circulation code. These are set in the relevant patron membership code in CPMC (see Circulation Set Up Manual, 7.21-2).

A distinct warning message associated with each of these four scenarios will display at check out at the point at which the item which would exceed these limits is being checked out. Thus it is possible to determine in each case which limit has been reached and which field in a library's circulation setup should be edited if the warning messages appear frequently and unnecessarily. However, whenever these limits are reached, it is possible to override and continue with the current checkout transaction.

If limit 1A on the amount of items within one circulation code that a reader can check out during an uninterrupted checkout session is exceeded, the following warning is displayed:

Limit of XX xxx items just checked out to this patron. Continue Y/N?

Type **Y** and press <**Return**> to override the limit and to continue checking the current item out.

Type **N** and press <**Return**> not to check the current item out and to go back to the item prompt.

If limit 1B on the total amount of items from any circulation code that a reader can check out during an uninterrupted checkout session is exceeded, the following warning is displayed:

Limit of X items just checked out to this patron. Continue (Y/N) ? N

Type **Y** and press **<Return>** to override the limit and to continue checking the current item out.

Type **N** and press **<Return>** (or just press **<Return>**) not to check the current item out and to go back to the item prompt.

If limit 2A on the amount of items within one circulation code that a reader can have in their possession at any one time is exceeded, the following warning is displayed:

Too many items for this Patron Group/Circ Code. Continue Y/N?

Type **Y** and press **<Return>** to override the limit and to continue checking the current item out.

Type **N** and press **<Return>** (or just press **<Return>**) not to check the current item out and to go back to the item prompt.

If limit 2B on the total amount of items from any circulation code that a reader can have in their possession at any one time is exceeded, the following warning is displayed:

The total number of items allowed in possession has been exceeded. Do you still wish to check out this item (Y/N) ? : N

Type **Y** and press **<Return>** to override the limit and to continue checking the current item out.

Type **N** and press **<Return>** (or just press **<Return>**) not to check the current item out and to go back to the *borrower* prompt.

NB: Owing to a bug, these messages can occasionally appear when the limits established in your library's setup tables have not been reached. This can occur if a reader has just renewed some items and is then having new loans checked out; OLIS may err by counting the renewal as two separate loans at this point, and thus display an inaccurate error message. A solution to this bug is being sought. In the intervening period, it may be necessary to override inaccurate messages.

Note that a limit on the maximum number of consecutive times a particular item can be renewed by the same reader may also be invoked. Please see below 3.29 for details.

Items on hold

If for any reason a reader attempts to check out an item which is on the hold shelf for another reader, the following message will display:

This item is held for another patron Press any key to continue.

No override option is available. Press **<Return>** to go back to the item prompt.

Please note that it is currently possible for readers to check out items which have been reserved for other readers if the current status of such an item is available.

Pending hold

The following message display if the matrix field Held Circ Code (see Circulation Set Up Manual, 8.24) is being used to apply different loan policies to loans when items are reserved:

```
Pending hold(s) - reduce loan period (Y/N) ? :
```

This message indicates that there are outstanding reservations on this particular item (e.g., a hold queue). You are thus able to determine at this prompt whether you wish the ordinary loan rules for this circulation code/patron membership combination to apply irrespective of reservations, or whether you wish the loan rules from the Held Circ Code to apply.

Type **y** and press **<Return>** to have the loan rules from the Held Circ Code apply (these may result in checking the item out for a shorter period).

Type **n** and press **<Return>** to apply the loan rules for the circulation code/patron membership combination irrespective of reservations.

Item satisfies patron hold

If the following message displays as an item is checked out

```
This Item satisfies patron hold without capture to hold shelf
Press any key to continue
```

This indicates that a reservation with a system-wide scope has been placed for the reader to whom this item has been checked out on this title at another library. The item you have checked out to them has thus satisfied this hold without the reader needing to borrow an item from the library which placed the hold. When this message appears, just press **<Return>**, and a due date and time for the loan will be calculated as usual.

Another item held for borrower

If a message similar to the following appears as you check an item out to a reader:

```
Another item is held for this borrower.
Pickup location is Lib.Aut.Srvce LAS Offices
Do you wish to cancel this hold/booking (Y/N) ?
```

This indicates that a copy of the same title is awaiting collection by the reader at another library of which they are a member. It will usually be appropriate for the other library to cancel the reader's hold for its item in these circumstances, but there may be cases in which the reader will still want the item at the other library held for them (an example might be where this is a different item or issue number from the item they are currently checking out at your library). We advise therefore that you type **n** and press **<Return>**, at this prompt, and then liase with the reader and the library mentioned in the message to advise them that they may wish to cancel the hold against their item.

Current Status: Lost and Paid
If the following message appears when you try to check an item out to a reader:

```
The Current Status for this item is : Lost and Paid
This item may NOT be checked out. Press <ENTER> :
```

On some previous occasion the item will have been registered as lost and a charge paid for its replacement. The item status can be cleared and the item checked out to the current reader if the item barcode is first wanded in at the checkin screen.

Override due date?

It is possible to set up a loan policy for the borrowing of some items by some readers in your library which will prompt staff to override the default loan period at the point of check out. If such an item is wanded in at check out to be borrowed by such a reader, a message similar to the following will appear:

```
Loan period : BLAS100    Date Due : 26 APR 1999   Due Time : 10:00am
Do you wish to override this due date? (Y/N/(A)bort) :
```

Type **n** and press **<Return>** (or just press **<Return>**) to check the item out using the default due date and time shown. Enter **a** and press **<Return>** to abort the transaction, and to go back to the item prompt without checking the item out. Enter **y** and press **<Return>** to override the default due date and time shown, and to check the item out using a discretionary loan period. The following prompt will appear:

```
Please enter a use period code :
Valid entries: (C)ontinuous, (D)ays, (H)ours, (M)inutes
```

Enter type of period for which you wish to loan this item. This will usually be **D** or **H**, but may also be **M**. Then press **<Return>**.

```
Numeric value : 1 - 9999
Please enter number of days :
```

Enter the length of the loan period for which you wish to check out this item. For instance, if you have entered D at the previous prompt, and wish to loan the item to the reader for two weeks, type **14** at the current prompt and press <**Return**>.

You will then be asked to confirm the calculated due date and time:

```
Loan period : D14       Date Due : 07 MAY 1999   Due Time : 05:00pm
Do you wish to override this due date? (Y/N/(A)bort) :
```

Press **<Return>** or **n** and **<Return>** to use the date shown, **a** and **<Return>** to abort checking the item out, or **y** and **<Return>** to repeat the above process, specifying a different period for the current loan.

This process will be repeated each time such items are checked out to such readers. If you are likely to wish to check out many such items to such readers, specifying a loan period in such a way will probably be time-consuming and unnecessary. We would therefore recommend that you change field 7 of the matrix first screen for the circulation code/patron membership combination concerned to **N** (see Circulation Set Up Manual, 6.9, 8.21). However, if you are only likely to check out *very* few of such items to such readers, this facility to enter a discretionary due date at the moment of check out *may* be found useful.

Wrong location

A confused reader may attempt to renew an item at the wrong library. The following message will display at such circumstances:

```
This item cannot be renewed here.
Return to library accepting xxx items. Press <ENTER> :
```

The three-letter code will indicate the appropriate checkout/renewal location for the item: hand the item back to the reader and suggest that they return the item to that location. Pressing **<Return>** will take the cursor back to the item prompt.

Missing book barcodes

A reader may wish to borrow an item which has been catalogued, but the barcode of which is missing or can no longer be read by the barcode scanner. It is still possible to issue the item in these circumstances - we suggest that a new book barcode is inserted in the item, and that the third conversion on-the-fly procedure is followed (see 3.35-6). If it transpires out that the item has not been catalogued after all, you may follow the first or second conversion on-the-fly procedures (see 3.30-5).

If for any reason you do not have any book barcodes easily available in your library, it is possible to check the item out by conducting an online search for the item and retrieving the piece record. Use the following guidelines in these rare circumstances:

Step 1

Type or select the option for **cout** from any menu screen in the circulation module and press **<Return>**. At the following prompt:

Enter Patron Name or Barcode:

wand in the borrower barcode. A blank checkout screen will appear.

Step 2

At the item prompt, type **s** and press **<Return>**. The first staff OPAC search screen will appear.

Step 3

You may use any search command to locate the required title (e.g. **t=** to browse by title, **c=** to browse for the shelfmark, or **i=** to search for the ISBN). Please see the OLIS OPAC staff pocket reference guides (available from LAS in leaflet form), or the OLIS OPAC reader pocket reference guides (http://www.lib.ox.ac.uk/olis/). Then access the Brief Display screen for that title.

Step 4

Select the **Retrieve #** option, then type in the line number of the current copy and press **<Return>**. The status of the current copy will be the default, i.e., **Available** or blank (NB: if your library has several available copies of the item, and you have any difficulty working out which is the current copy, it may be necessary to check on your shelves). The item will be issued and the barcode number will display with a due date and time. It is advisable to add a note to the item to ensure that it is given a new barcode/repaired on its return (see 4.11-2 below on adding a note to an item at check out).

If there is no copy available in your library then this may be an item which has not yet been catalogued. You should follow one of the first two procedures for conversion on the fly (see 3.30-5 for guidelines).

Keyboard time-out

If a borrower record is left retrieved at check out for two minutes without any activity, and an item barcode is then entered, the following error message will display:

Keyboard timeout, Is the Patron ID still valid (Y/N) ?

This timeout acts as a check so that in the event of any distraction, there will be less danger of checking items out to the wrong borrower by mistake.

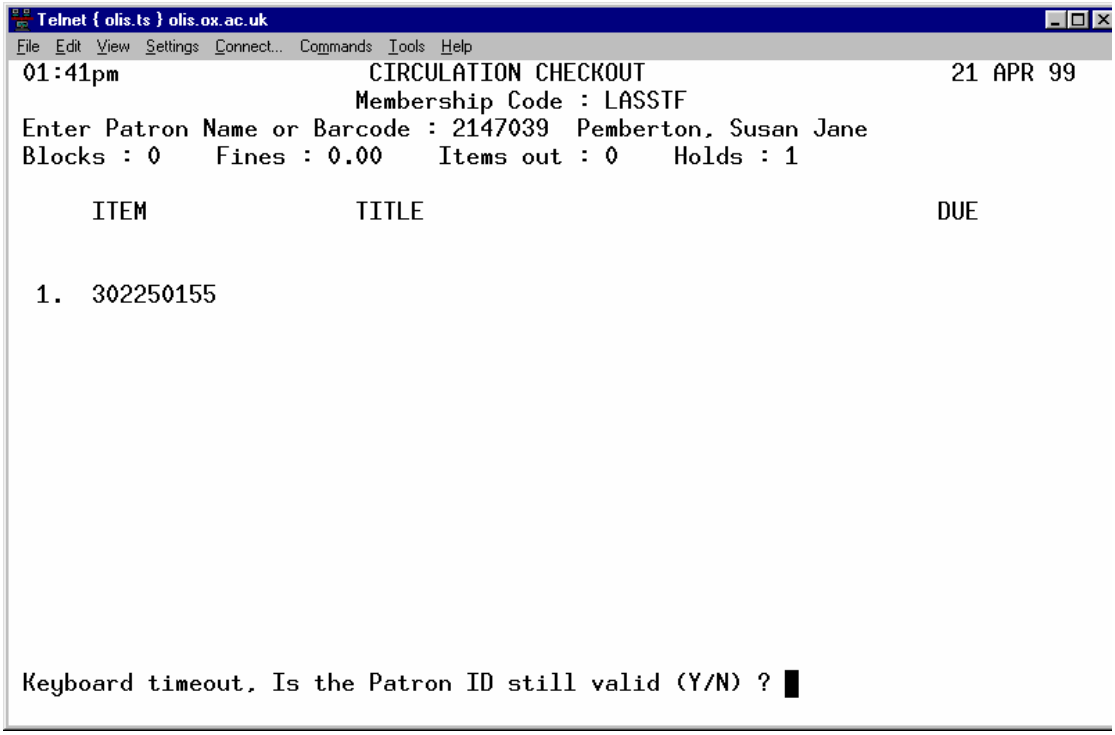
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
01:41pm CIRCULATION CHECKOUT 21 APR 99
Membership Code : LASSTF
Enter Patron Name or Barcode : 2147039 Pemberton, Susan Jane
Blocks : 0 Fines : 0.00 Items out : 0 Holds : 1
ITEM TITLE DUE
1. 302250155
Keyboard timeout, Is the Patron ID still valid (Y/N) ?

Figure 3.11 Keyboard timeout prompt

Type **y** and press **<Return>** to continue to check the item(s) out to the displayed borrower.

Type **n** and press **<Return>** to clear the screen and to go back to the checkout borrower prompt, at which point you may enter a new borrower barcode.

Invalid barcode

If the following message displays when you wand in an item barcode at checkout:

```
This is not an item barcode ! Press <ENTER> :
```

please attempt to enter the barcode again. If the system refuses to accept the barcode several times, it may be worth giving the item a new barcode and checking the item out using the third conversion on-the-fly method (see below 3.30-5), or checking the item out by searching the database and retrieving the piece record (see above 3.21)

Circulation calendar not up to date

If opening and closed times for your library have not been entered in its circulation calendar to cover the date calculated as the due date/time for an item at check out, a message similar to the following will display:

```
Circulation calendar is not up to date.
 Addition option (H)oliday
Enter OPENING time for 28 OCT 1999 ((HH:MM))
```

This is most likely to occur if you are at the start of a special loan period and are loaning items for some time into the future.

In the immediate case it is possible to enter on-the-fly open and closed times for your library on the date in question, thus enabling the current item or items to be checked out. However, since this will be a time-consuming process until your library calendar is updated, we *strongly* recommend that your library's circulation calendar is extended ***at the very least*** to cover your current loan periods. See Circulation Set Up Manual 1.5-6 on how to extend your library's calendar: please note that it will then be necessary to contact LAS so that a processing job can be run so that your updates to the calendar can take immediate effect.

To continue with checking out the current item (and any other items in the intervening period), when the above message appears, type in an opening time (in the format HHMM or HH:MM) for your library on the day in question. A message similar to the following will then appear:

```
Enter CLOSING time for 25 OCT 1999 (HH:MM)
```

Type in a closed time for your library on the day referred to in the same format and press **<Return>**. The following message will then appear:

```
Do you wish to continue (Y/N) :
```

Type **Y** and press **<Return>** to continue with the checkout transaction using the times you have entered. If you type **N** and press **<Return>**, or just press **<Return>**, you will prompted again for opening and closing times to be used in the transaction.

Item cannot be checked out

A message similar to the following

```
Loan period : SOC Periodicals    Membership Code : SOCSTF
This patron cannot check out this Item. Do you wish to override? (Y/N) :
```

will appear when you wand in a book barcode at check out if the circulation code of the item has not been linked in the matrix to the patron membership group of the reader (see Circulation Set Up Manual, ch.8, especially 8.14-5). The codes will not have been linked probably in order routinely to prevent such readers from borrowing such items, so you will probably wish to type **N** and press **<Return>** to prevent the loan. However, in exceptional circumstances, you may wish to type **Y** and press **<Return>**in order to enable such a reader to borrow such an item: the loan period picked up will be the default from the circulation code at the generic level in the table CCC (see Circulation Set Up Manual, ch.6, especially 6.8-9).

The message

This item cannot be checked out

will appear if the circulation code of the item and the reader's patron membership have been linked in the matrix with a zero loan period (see Circulation Set Up Manual, 8.14-5). No override option will be available here.

Patron's card will expire

If a message such as the following appears when you check an item out to a reader:

This patron's card will expire on Friday 23-04-99 The above date will also be the due date for this item .

This indicates that the loan period of the item has been reduced to take account of the fact that the reader's *membership in your library* is about to expire (note that in spite of the reference to the patron's card expiring, this error message in fact refers to the imminent expiry of the reader's membership in your library). Press **<Return>** to accept this adjusted date. If you wish to enable the reader to borrow the item for the full duration of the usual loan period, it will be necessary to extend their period of membership (type **p** and press **<Return>** to access their patron registration screen, type **10** and press **<Return>** to access the *Expiration date* field, type in the new expiry date and press **<Return>**, and then select **File** and press **<Return>**). It will then be possible to renew the loan (see below, 3.24-7, on renewals).

Renewals

Renewals extend the loan period on an item already on loan to a borrower. Renewals are usually made on or before the due date of the item, though it is also possible to renew overdue items. Items may be renewed for readers by staff in one of two ways via the checkout screen. This section will describe these two methods, and will then explain some of the error and warning messages which can appear during renewal.

To renew an item from Check out (Method 1)

This method is most useful if the reader is in your library at the time and has the item(s) with them for renewal.

Step 1

If you are not already at the checkout screen, select the option for or type **cout** from any menu in the circulation module and press **<Return>**. The following prompt will appear:

Enter Patron Name or Barcode:

Step 2

Enter the borrower's barcode either by wanding with a barcode reader, or by typing it in manually and pressing **<Return>**.

(See 3.5 above for alternative methods of retrieving a borrower's record.)

Step 3

At the item prompt wand in the barcode of the item for renewal. The following prompt will appear:

```
This item is currently checked out to this patron on 22 APR 99 at 11:43
Renew Item (Y/N/yes to All) ?
```

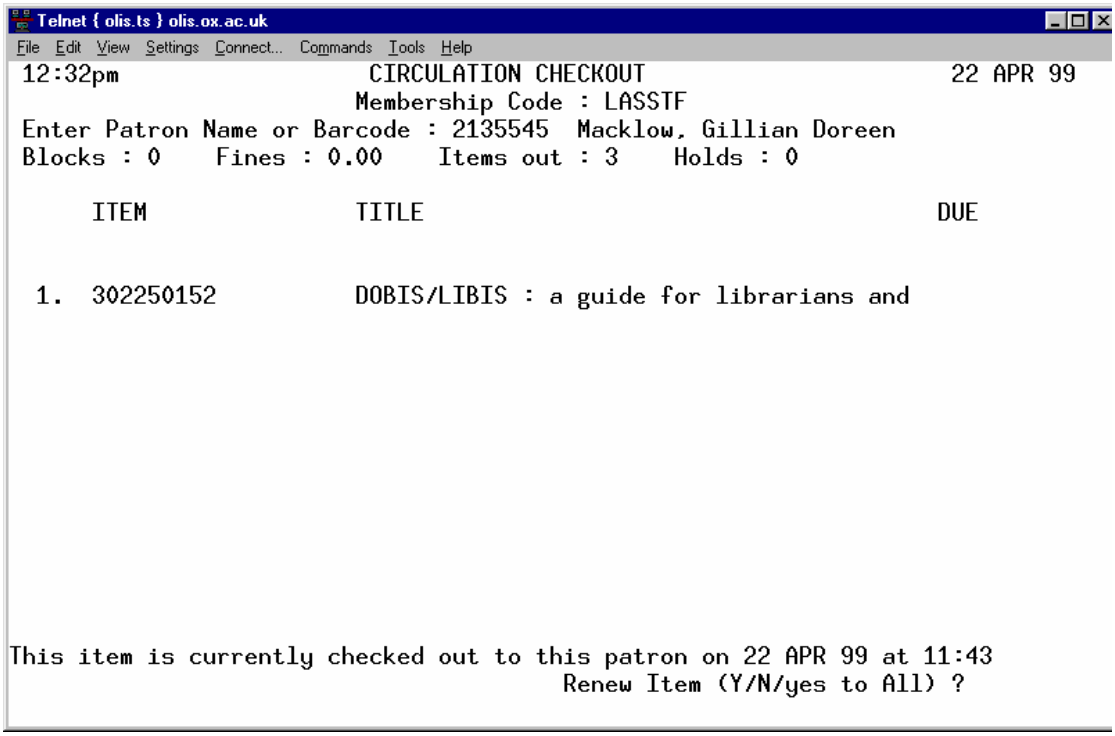
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
12:32pm CIRCULATION CHECKOUT 22 APR 99
Membership Code : LASSTF
Enter Patron Name or Barcode : 2135545 Macklow, Gillian Doreen
Blocks : 0 Fines : 0.00 Items out : 3 Holds : 0
ITEM TITLE DUE
1. 302250152 DOBIS/LIBIS : a guide for librarians and
This item is currently checked out to this patron on 22 APR 99 at 11:43
Renew Item (Y/N/yes to All) ?

Fig. 3.12: Checkout screen (Renewal prompt)

Step 4

Type **y** and press **<Return>** to confirm renewal of the item. The new due date and time for the item will display.

If you type **a** and press **<Return>**, the current item will again be renewed. However, typing **a** also indicates to OLIS that further items will be renewed for this reader in this checkout session, so that if and when further such renewals are made, this prompt will not display.

Answering **n** and pressing **<Return>** or just pressing **<Return>** produces no changes to any conditions associated with the item (i.e., it will still be out on loan to the current reader with the former due date). The cursor will go back to the item prompt.

To renew an item from Check out (Method 2)

This method is most useful if the reader is not in your library at the time, and/or does not have the item(s) with them for renewal. It is also likely to be of use if the reader wishes to renew all the items they currently have out on loan

Step 1

If you are not already at the checkout screen, type **cout** from any menu in the circulation module and press **<Return>**. The following prompt will appear:

```
Enter Patron Name or Barcode:
```

Step 2

Wand in the borrower's barcode with a barcode reader, or type it in manually and press **<Return>**. Alternatively, it may be more convenient in this situation to retrieve a borrower record using the borrower's name (especially if they are renewing by telephone), entering the name in the format *surname, forename* (e.g., **peatl** or **peatling, g** - it is usually not necessary to enter the entire name.

(See 3.5 above for alternative methods of retrieving a borrower's record.)

Step 3

At the item prompt type **it** and press **<Return>**. A screen containing details of the reader's current loans, similar to the following, will appear:

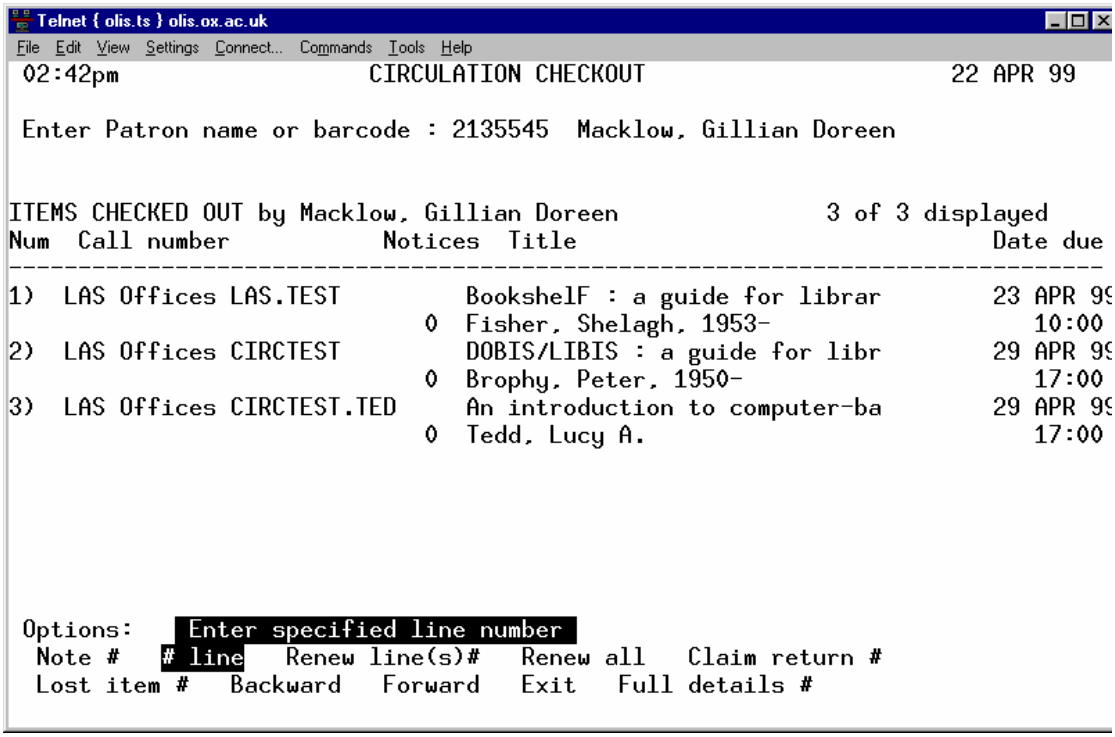
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
02:42pm CIRCULATION CHECKOUT 22 APR 99
Enter Patron name or barcode : 2135545 Macklow, Gillian Doreen
ITEMS CHECKED OUT by Macklow, Gillian Doreen 3 of 3 displayed
Num Call number Notices Title Date due
1) LAS Offices LAS.TEST BookshelF : a guide for librar 23 APR 99
0 Fisher, Shelagh, 1953- 10:00
2) LAS Offices CIRCTEST DOBIS/LIBIS : a guide for libr 29 APR 99
0 Brophy, Peter, 1950- 17:00
3) LAS Offices CIRCTEST.TED An introduction to computer-ba 29 APR 99
0 Tedd, Lucy A. 17:00
Options: Enter specified line number
Note # # line Renew line(s)# Renew all Claim return #
Lost item # Backward Forward Exit Full details #

Fig. 3.13: Reader's item list, accessed via check out

Step 4

To renew one of several items a reader has out on loan, select the **Renew line(s) #** option, type in the relevant line number (e.g., **2**) and press **<Return>**.

To renew some but not all of the items a reader has out on loan, select the **Renew line(s) #** option, type in the relevant range of line numbers (e.g., **1,3** or **2-3**), and press **<Return>**.

To renew all titles, select the **Renew all** option and press **<Return>**.

New due dates and times for all successfully renewed items will be displayed.

Error messages during renewals

If any error messages are generated during your attempted renewal(s), please use the following notes for guidance.

Item overdue

If an item is overdue and is selected for renewal, the following prompt appears:

```
Item 300012345 is due 10 JUN 1996 17:00
This item is OVERDUE and must be checked in. Checkin and Renew ? (Y/N) :
```

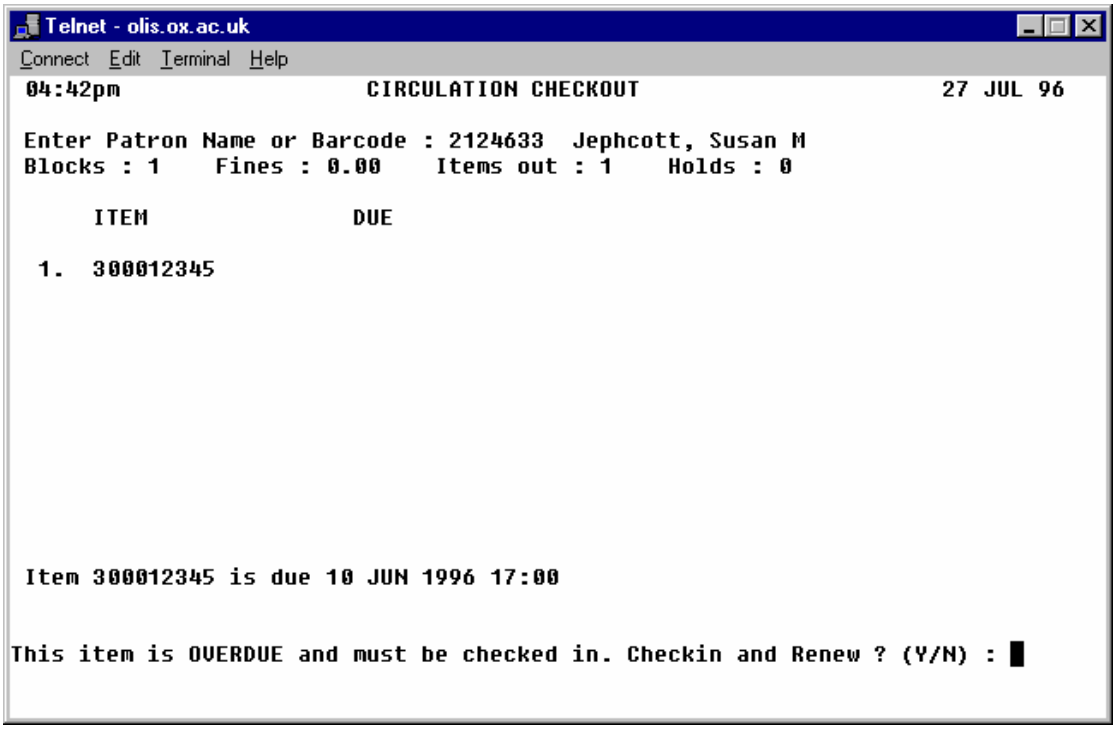
Telnet - olis.ox.ac.uk
Connect Edit Terminal Help
04:42pm CIRCULATION CHECKOUT 27 JUL 96
Enter Patron Name or Barcode : 2124633 Jephcott, Susan M
Blocks : 1 Fines : 0.00 Items out : 1 Holds : 0
ITEM DUE
1. 300012345
Item 300012345 is due 10 JUN 1996 17:00
This item is OVERDUE and must be checked in. Checkin and Renew ? (Y/N) :

Fig. 3.14: Renewal (Overdue prompt)

NB: Confusion can arise particularly when renewing a large number of overdue items for the same reader: it is possible to miss the fact that some items may have been reserved (see below, 3.28-9). Please pay close attention to any error messages when renewing a batch of overdue items.

Type **y** and press **<Return>** to check in and renew the item. If renewal is possible for the loan, the checkin screen will first be displayed, and any outstanding fines (including overdue charges associated with this particular item) will be calculated and displayed at this point, and payment or waiving may be registered (see above 6.5-10).

The checkout screen will then be redisplayed, and the new due date/time for the item will be shown.

If you wish to check the item in but *not* to renew it, tying **n** and pressing **<Return>** or just pressing **<Return>** at the above overdue prompt will produce no change in the status of the item. You can then check the item in if desired. Any overdue fines will be displayed at checkin (see below, 5.3-4, 9-12).

Item held

If an attempt is made to renew an item which has been reserved by another reader a message similar to the following will display:

```
Item 302250152 is due 29 APR 1999 17:00
This item is on hold. Renew (Y/N) or H to show holds  :
```

Type **H** and press **<Return>** to display summary information about the reservation (the reserver's name will not be displayed here).

Type **Y** and press **<Return>** to renew the item to the current borrower.

Type **N** and press **<Return>** or just press **<Return>** if you do not wish to renew the item for the current borrower. The following message will then display:

```
Renewal not allowed. Do you want to checkin (Y/N) :
```

Type **Y** and press **<Return>** at this prompt to check the item in to make the item available for the next reader to collect. Type **N** and press **<Return>** or just press **<Return>** at this prompt if you wish to leave the item in the possession of the current borrower but not renewed.

Item overdue and held

If the item is overdue **and** has been reserved by another reader, the following message will display:

```
Item 302250152 is due 20 APR 1999 17:00
This item is OVERDUE and HELD. Checkin and Renew ? (Y/N/H) :
```

The same options apply as for items not overdue but reserved by other readers; type **Y** and press **<Return>** to renew for the current reader, type **N** and press **<Return>** or just press **<Return>** not to renew the item for the current reader, and to provide the option to check the item in to make it available for the reserver to collect.
NB: It is possible, if you wish, to prevent *any* renewal of items which are reserved by other readers by using the Held Circ code field in the appropriate part(s) of the matrix (see Circulation Set Up Manual, 8.24).

Item recalled
If an item has been recalled by the library, it will not be possible to renew it. In the event of an attempted renewal, the following message is displayed:

```
Current status = Recalled
Renewal not allowed. Do you want to checkin (Y/N) :
```

Type **Y** and press **<Return>** to check the item in. Typing **N** and pressing **<Return>**, or just pressing **<Return>**, will result in no change in the item's status.

Lost Items
A reader will not be able to renew any item which has been flagged as lost. If an attempt is made to renew such an item through check out, the following message will display:

```
 Current status = Billed as Lost
Renewal not allowed. Do you want to checkin (Y/N) :
```

If you wish the reader to retain the item in their possession, you must first type Y at this prompt and press **<Return>** in order to check the item in and clear the lost item status. You may then check it out to the reader again.

[**NB**: See 4.15 below on how to flag an item as lost. It is possible to renew an item flagged as *claimed return* without changing its status back to the default, as it may be possible that one would renew such an item solely to prevent overdue fines being accrued on it. Checking in a claimed return item *will* change its status back to the default. On the claimed return flag, see 4.13-5 below]

Maximum renewals

It is possible to set a limit in the appropriate table in the matrix on the number of consecutive times a reader can renew an item (see Circulation Set Up Manual, 8.24). If an item is being renewed for the last possible consecutive item, a message similar to the following will display under the item prompt:

```
1.  302250152        DOBIS/LIBIS : a guide for librarians and  29-04-99  05:00pm
Last renewal
```

If an attempt is made to renew an item consecutively more times than the permitted limit, the following message will display:

```
Maximum renewals for this Item have been reached.
```

It is **not** possible to override this final limit. If it is desired to leave the item in the reader's possession, it is necessary to check the item in and check it out again to the same reader.

Remote renewals

It is also possible for readers to renew items remotely, i.e., over the OPAC or through GeoWeb without involving staff. See the third reader pocket reference guide in leaflet form or at http://www.lib.ox.ac.uk/olis/rpr3/index.htm on how to renew items over the OPAC. Please note that it is not possible for readers remotely to renew items which have been reserved by other readers, and/or which are overdue.

It is possible for libraries to attach special conditions to the remote renewal of items by readers (e.g., a maximum specific to the consecutive remote renewal of items by readers), or to turn off the facility altogether in their libraries: Please see Circulation Set Up Manual, 8a.17-23 for details.

Conversion on the fly

Introduction

When items presented for check out have not previously been catalogued, it is possible to enter enough item or bibliographic record onto OLIS to enable an online record of the item's circulation to be kept. This process is called *conversion-on-the-fly*.

Conversion-on-the-fly enables an online record to be kept of the loan of in-demand items which libraries have been unable formally to catalogue. It thus may be particularly useful for libraries just taking up the circulation module, or libraries which wish to circulate immediately items the receipt of which has been expected but delayed (e.g., journal issues).

There are two options within the conversion-on-the-fly screen:

- You may select **Continue** and enter onto OLIS brief details of the item, which will typically include the item title and shelfmark (but can include anything deemed necessary by your library to identify the item). When such an item is subsequently returned to your library and checked in, a message appears on the screen stating that the item is to be sent to cataloguing (see below, 5.22). Though it will be possible to issue the item again without adding to the brief record, no piece record will appear in the OPAC until that record is upgraded by a cataloguer.

- You may select **Search Link** in order to link the new barcode you have just added to the item to an existing bibliographic record for the item, thus creating a piece record for the item. If there is a correct bibliographic record already in OLIS for the item (whether put there by your library or another library), this option will thus create a piece record for the item that will appear in the OPAC, and no further cataloguing work will be necessary. A variant of this option enables you to link the new barcode you have just added to the item to an existing piece record for the item, thus replacing an existing system-generated or physical barcode. This is useful when circulating items which have been catalogued but not barcoded, or items the barcode of which has become illegible or fallen out.

Your choice between these options will be dependant partly on the likelihood of finding a piece/bibliographic record for the item, and partly on the size of the queue at your circulation desk.

Creating an on the fly record

When an item which does not have a barcode is presented for check out at your circulation desk, you should affix a new barcode to it and wand in the barcode at the item prompt. When such a barcode without a bibliographic record is entered at the checkout item prompt, the system will automatically display a screen similar to the following:

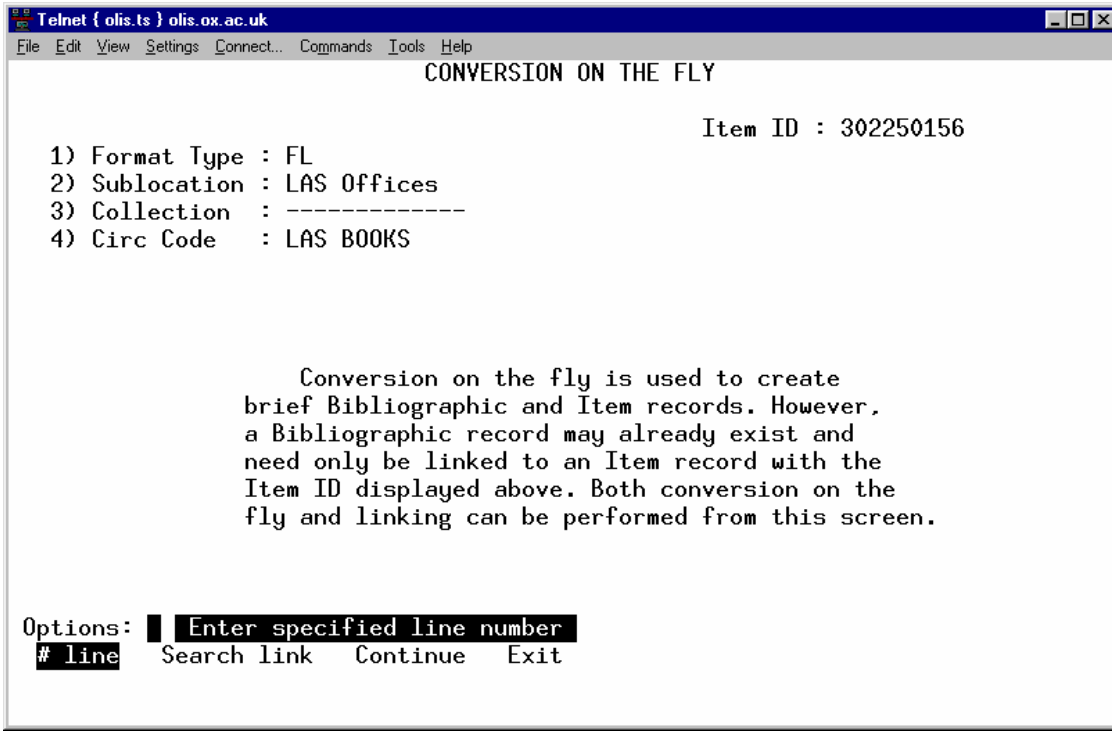
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
CONVERSION ON THE FLY
Item ID : 302250156
1) Format Type : FL
2) Sublocation : LAS Offices
3) Collection : ----------
4) Circ Code : LAS BOOKS
Conversion on the fly is used to create
brief Bibliographic and Item records. However,
a Bibliographic record may already exist and
need only be linked to an Item record with the
Item ID displayed above. Both conversion on the
fly and linking can be performed from this screen.
Options:
Enter specified line number
line
Search link
Continue
Exit

Fig. 3.15: Conversion on the Fly screen

At this point one should select either of the two options for conversion, **Search Link** or **Continue**.

Which should I use - Search Link or Continue?

If….
a) you have a queue of readers, select the **Continue** option (see 3.32-3).

b) you have plenty of time and believe that there is a good chance of finding a bibliographic match for the item on OLIS, use the **Search Link** option (see 3.33-5). Also select the search link option if you know the item has been catalogued previously but not barcoded/the former barcode has become unusable (see 3.35-6). If you *cannot* then find a bibliographic/item record, it is possible to go back and select the **Continue** option.

Conversion on the fly using Continue

[NB: If you have decided to select the Continue option, it is possible at this point if desired to change the sublocation or circulation code respectively in lines 2 or 4 of the above screen - since the circulation code will affect the loan period of the item, this may particularly be of use. If you wish to change either of these codes at this point, select the **Line #** option on the option bar, type in the line number which you wish to change and press **<Return>**. You may then type **??** and press **<Return>** to see the available options, and type in the line number of the option you wish to use and press **<Return>**.]

Use the following guidelines when using the **Continue** option at this screen:

Step 1

Select the **Continue** option and press **<Return>**. The conversion on the fly work screen appears:

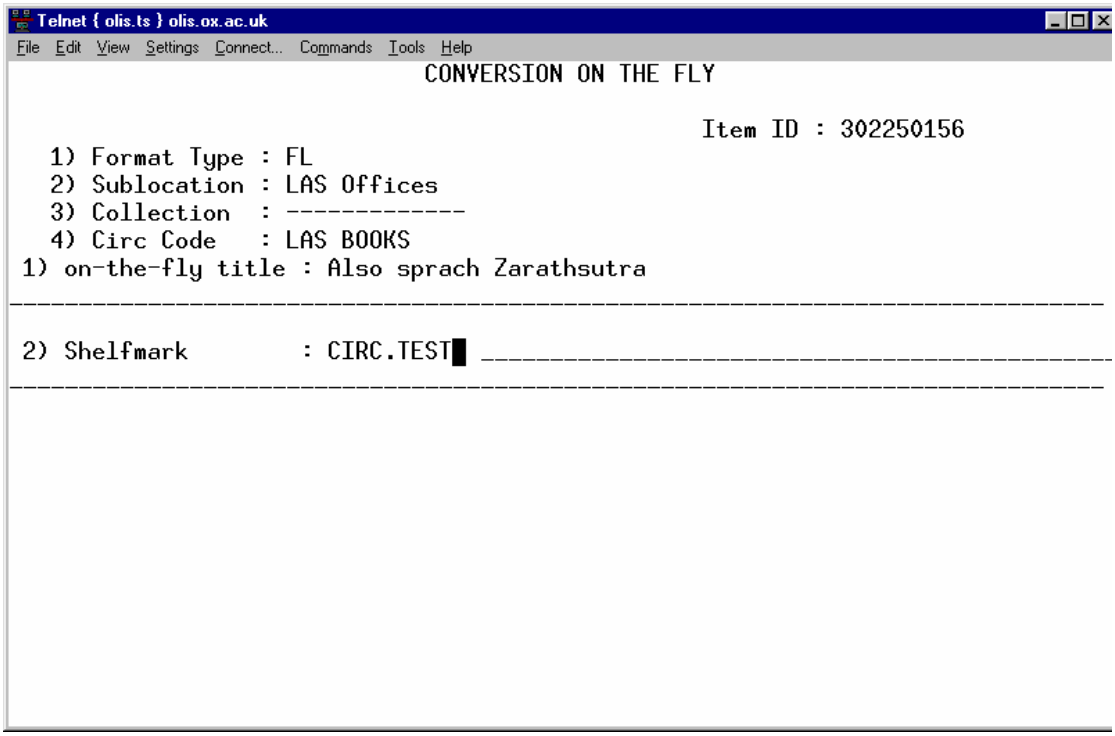
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
CONVERSION ON THE FLY
Item ID : 302250156
1) Format Type : FL
2) Sublocation : LAS Offices
3) Collection : ----------
4) Circ Code : LAS BOOKS
1) on-the-fly title : Also sprach Zarathsutra
2) Shelfmark : CIRC.TEST

Fig. 3.16: Conversion on the fly work screen

Step 2

Both the *title* and *shelfmark* fields should be filled in. Press **<Return>** to move from field 1 to 2 and down to the option bar when finished.

NB: It is possible to move back up to the title field, or from the title field back to the first conversion on-the-fly screen, by typing a period **<.>** and then **<Return>**.

Unfortunately neither the delete nor the backspace key will work in either of these fields. If you make an error in typing in the title or shelfmark, it is however possible to correct either by going back into either line from the option bar (by selecting the **Line #** option, typing the line number concerned and pressing **<Return>**) and typing

your corrections over the existing data, or by using the **Ctrl-H** function (i.e., typing **H** while holding down the **Ctrl** key) to delete the character immediately to the left of the cursor (i.e., wherever you would ordinarily use backspace).

Step 3

Select the **File** option and press **<Return>** to save your changes: the item will then be checked out to the borrower and a due date and time will appear as normal. Should you for any reason wish to abort the transaction and the conversion on-the-fly, select the **Exit** option and press **<Return>**.

Viewing on the fly records created using the Continue option

Please note that readers will *not* be able to see these on-the-fly records on the public OPAC. Staff will however have access to these records via the *dump file* index. This can be seen from the *staff* OPAC by typing **dp** = (search term) or **dpw** = (search term) and pressing **<Return>** at the search screen. Please note that these index codes are not listed on any of the initial staff search screens but are still valid commands.

Conversion on the fly using Search Link - 1; items not previously catalogued

If you have decided to select then **Search Link** option at the first conversion on-the-fly screen for an item which has **not** previously been catalogued, use the following guidelines:

Step 1

Select the **Search Link** option and press **<Return>**. The first staff OPAC search screen will appear:

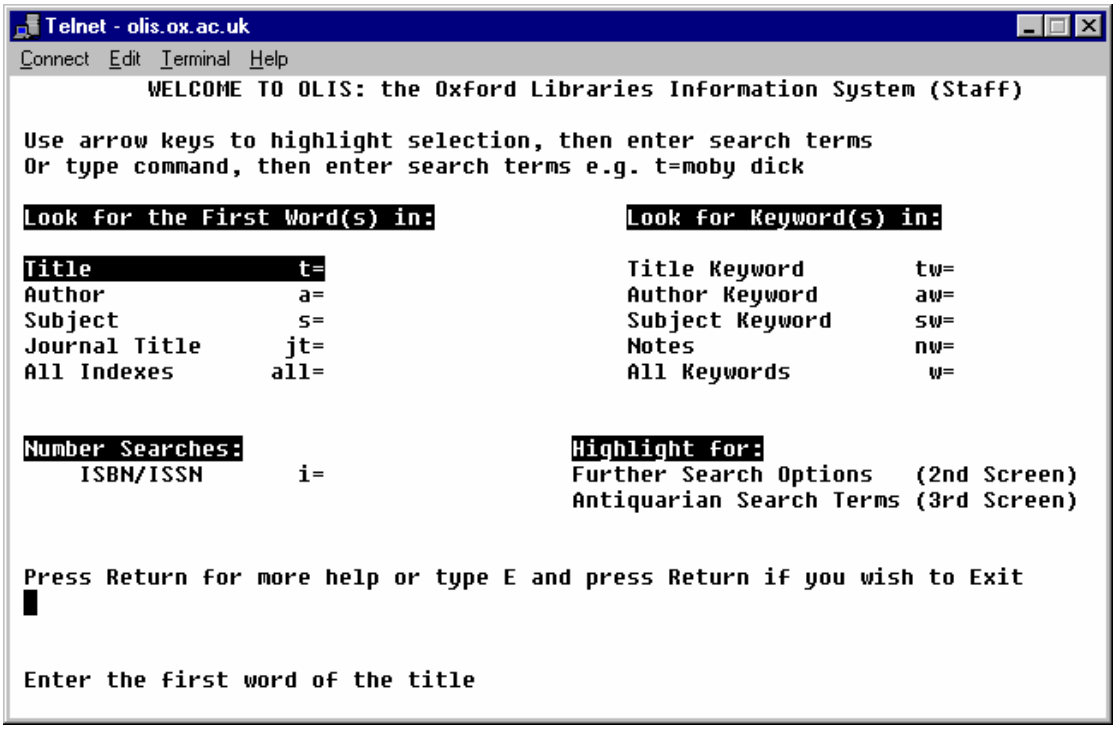
Telnet - olis.ox.ac.uk
Connect Edit Terminal Help
WELCOME TO OLIS: the Oxford Libraries Information System (Staff)
Use arrow keys to highlight selection, then enter search terms
Or type command, then enter search terms e.g. t=moby dick
Look for the First Word(s) in:
Look for Keyword(s) in:
Title t=
Author a=
Subject s=
Journal Title jt=
All Indexes all=
Title Keyword tw=
Author Keyword aw=
Subject Keyword sw=
Notes nw=
All Keywords w=
Number Searches:
ISBN/ISSN i=
Highlight for:
Further Search Options (2nd Screen)
Antiquarian Search Terms (3rd Screen)
Press Return for more help or type E and press Return if you wish to Exit
Enter the first word of the title

Fig. 3.17: First staff OPAC search screen

Step 2

Use any appropriate type of search, e.g., title first word, ISBN, etc. (Please see the OLIS OPAC staff pocket reference guides (available from LAS in leaflet form), or the OLIS OPAC reader pocket reference guides (in leaflet form or at http://www.lib.ox.ac.uk/olis/). If a bibliographic record which matches the current item is found, proceed to **Step 3**. If not, type **e** and press **<Return>** to exit the search screen. You are returned to the initial conversion on the fly screen and can here select the **Continue** option and press **<Return>** to proceed with conversion on-the-fly, creating a brief record for the item which will require upgrading in cataloguing later. (see above, 3.32-3).

Step 3

From the Item Display, always check the full MARC record to make sure that the record you have located is a bibliographical match for the item. To access the MARC record, select the **MARC** option and press **<Return>** . If the record is a match, select the **Retrieve** option and press **<Return>**. The *Holdings Display* screen will appear:

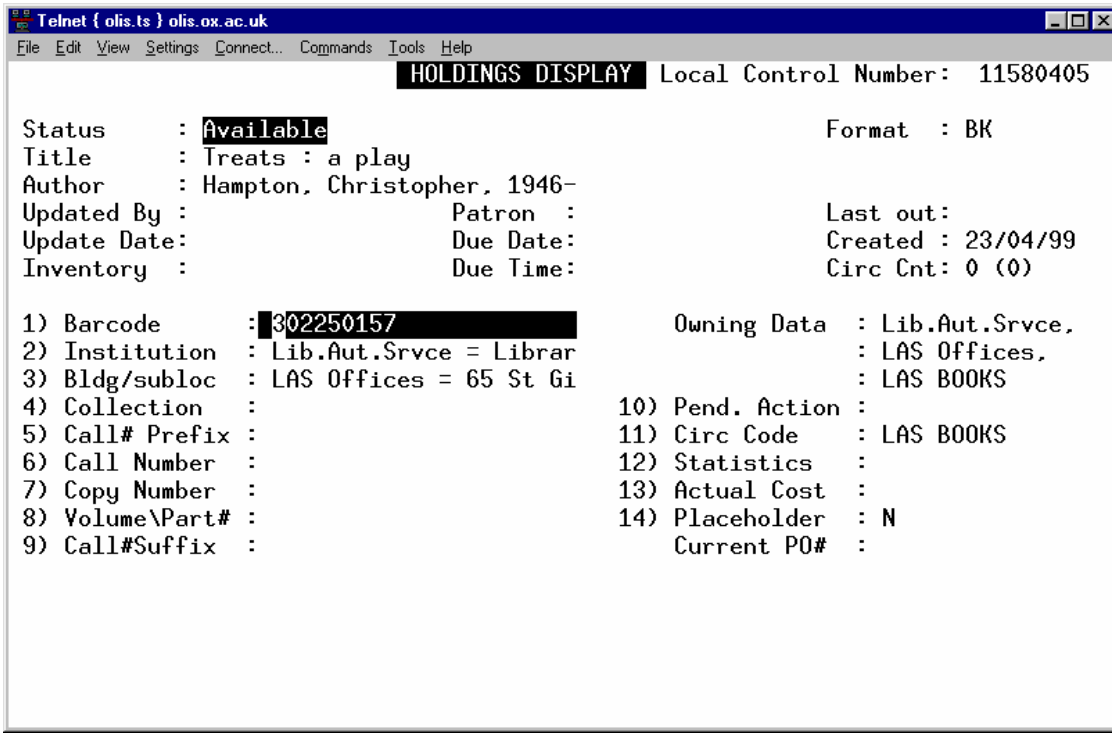

Fig. 3.18: Holdings Display screen

Step 4

The cursor will automatically appear in field 1 with the barcode that you have wanded in. Press the space bar and then **<Return>** in order to go down to the option bar. Check that other fields are correctly entered. You may particularly wish to enter a shelfmark in field 6, and possibly to alter the circulation code in field 11 if you wish to link this item to a circulation code other than the default. To access any field, select the **# line** option and press **<Return>**.

Step 5

Should you wish to abort the transaction and the conversion on the fly for any reason, select **Exit** and press **<Return>** to go back to the first conversion on-the-fly screen. Otherwise, when all fields are correct, select **File** and press **<Return>** to save your changes. You will then be asked if you wish to update the owning data: it is necessary to type **y** and press **<Return>** *if you have altered the circulation code from the default*.

The item will now be checked out to the borrower and a due date and time will appear as normal. No further cataloguing of such items is required.

Conversion on the fly using Search Link - 2; items previously catalogued

The **Search Link** option at the first conversion on-the-fly screen can also be used to enable you to issue an item which *has* previously been catalogued, but which requires a new barcode because it has not previously been barcoded or because the previous barcode has become unusable. In these circumstances, affix the new barcode to the item (concealing any unusable barcode already in the item) and wand it in to bring up the conversion on-the-fly screen. Then use the following guidelines:

Step 1

Select the **Search Link** option and press **<Return>**. The staff search screen will appear:

Step 2

Use any appropriate search to retrieve the item; it is likely that in the case of an item which you know has already been catalogued, a shelmark search (i.e., c=...) may be particularly useful. Locate the bibliographic record which matches the current item.

Step 3

When you are sure that the *bibliographic* record is a match for the item, locate the piece record for the current item on the list of pieces on the Item Display. The status of the current copy will be your library's default status, i.e., **Available** or blank (NB: if your library has several available copies of the item, and you have any difficulty working out which is the current copy, it may be necessary to check on your shelves). Then select the **Retrieve #** option, type in the line number of the current copy and press **<Return>**.

Step 4

The *Holdings Display* screen will appear, and the barcode that you have wanded in will automatically appear in field 1 replacing the former system-generated or physical barcode number. It is possible to edit other field in the piece record (for instance to add a shelfmark), but it is unlikely you would need to. To access any field, select the **# line** option and press **<Return>**.

Step 5

Should you wish to abort the transaction and the conversion on the fly for any reason, select **Exit** and press **<Return>** to go back to the first conversion on-the-fly screen. Otherwise, when all fields are correct, select **File** and press **<Return>** to save your changes. You will then be asked if you wish to update the owning data: it is necessary to type **Y** and press **<Return>** *if* you have altered the circulation code from the default.

The item will now be checked out to the borrower and a due date and time will appear as normal. No further cataloguing of such items is required.

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Further functions from Check out

Introduction

Although the checkout screen is primarily useful for registering the loan of items to readers, a number of other functions can also be accessed from the item prompt at the checkout screen. This chapter includes guidelines on how to access and use those functions from the checkout screen. It also includes guidelines on using registered borrowers with added borrowers at check out.

Further functions from check out

Most functions which are not directly to do with basic checkout procedure which are accessible through the checkout screen can be listed by typing **?** and pressing **<Return>** at the item prompt. The following list then displays:

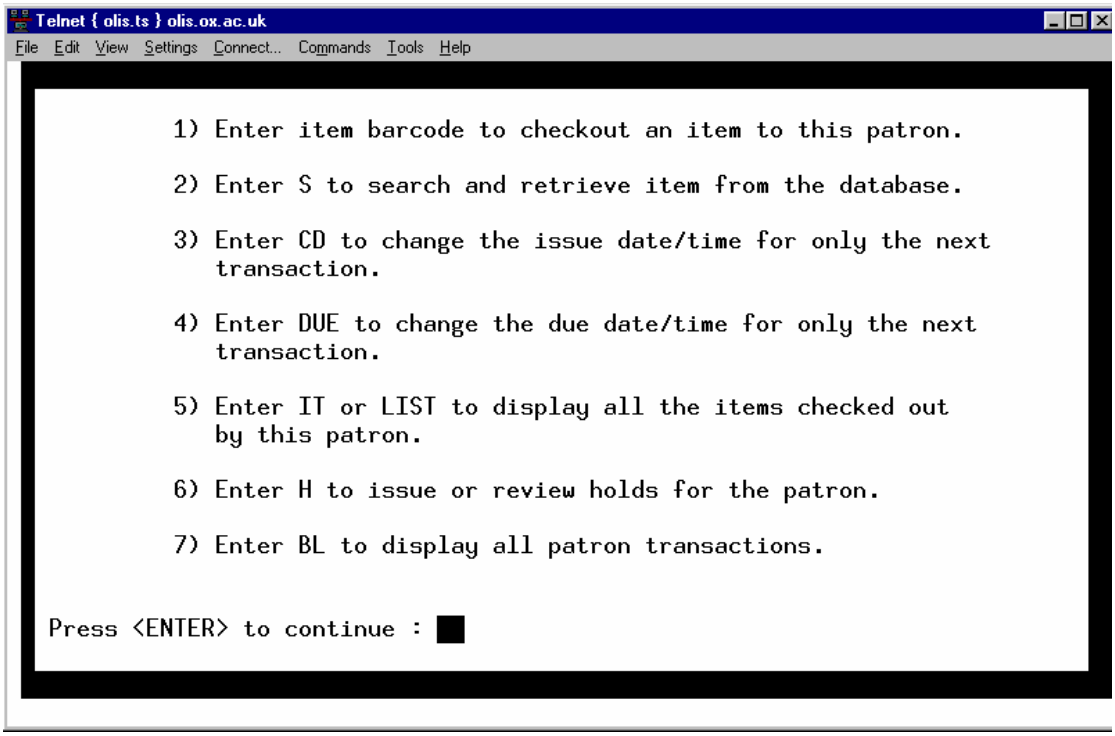
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
1) Enter item barcode to checkout an item to this patron.
2) Enter S to search and retrieve item from the database.
3) Enter CD to change the issue date/time for only the next transaction.
4) Enter DUE to change the due date/time for only the next transaction.
5) Enter IT or LIST to display all the items checked out by this patron.
6) Enter H to issue or review holds for the patron.
7) Enter BL to display all patron transactions.
Press <ENTER> to continue :

Fig. 4.1: First Help screen at Check out

Press **<Return>** to see further options:

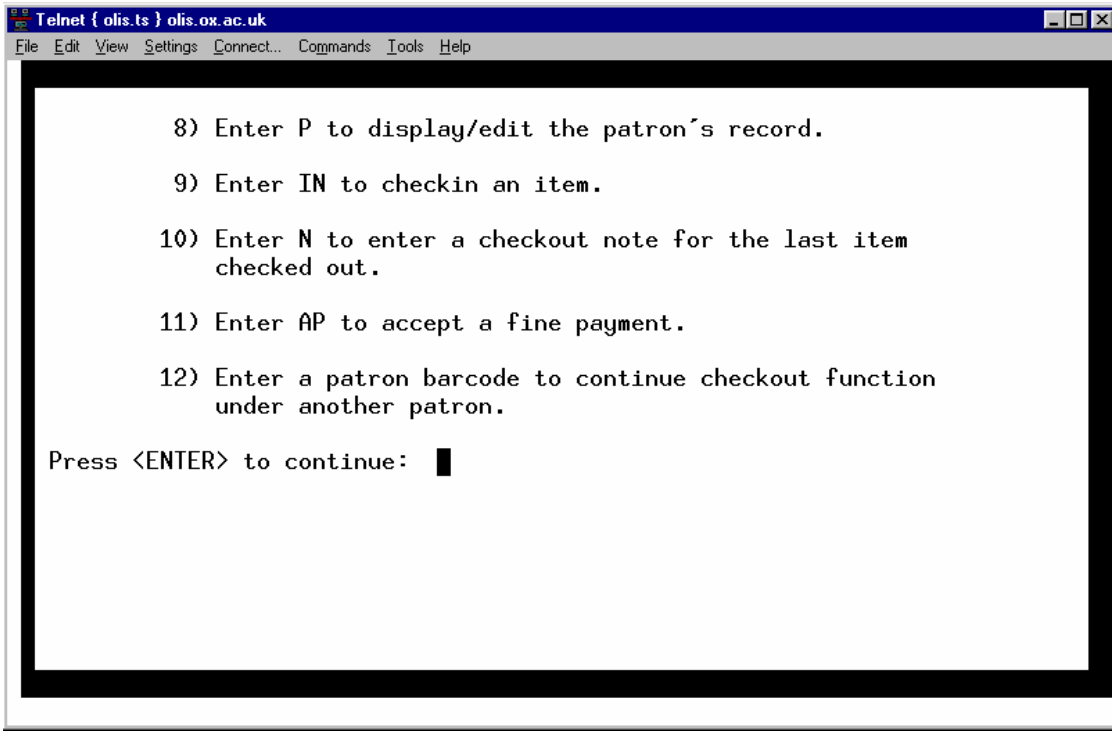
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
8) Enter P to display/edit the patron's record.
9) Enter IN to checkin an item.
10) Enter N to enter a checkout note for the last item checked out.
11) Enter AP to accept a fine payment.
12) Enter a patron barcode to continue checkout function under another patron.
Press <ENTER> to continue:

Fig. 4.2: Second Help screen at Check out

Most of these commands and functions are explained on the following pages:

s = search the database

Type **s** at the item prompt and press **<Return>** and the staff OPAC first search screen will appear:

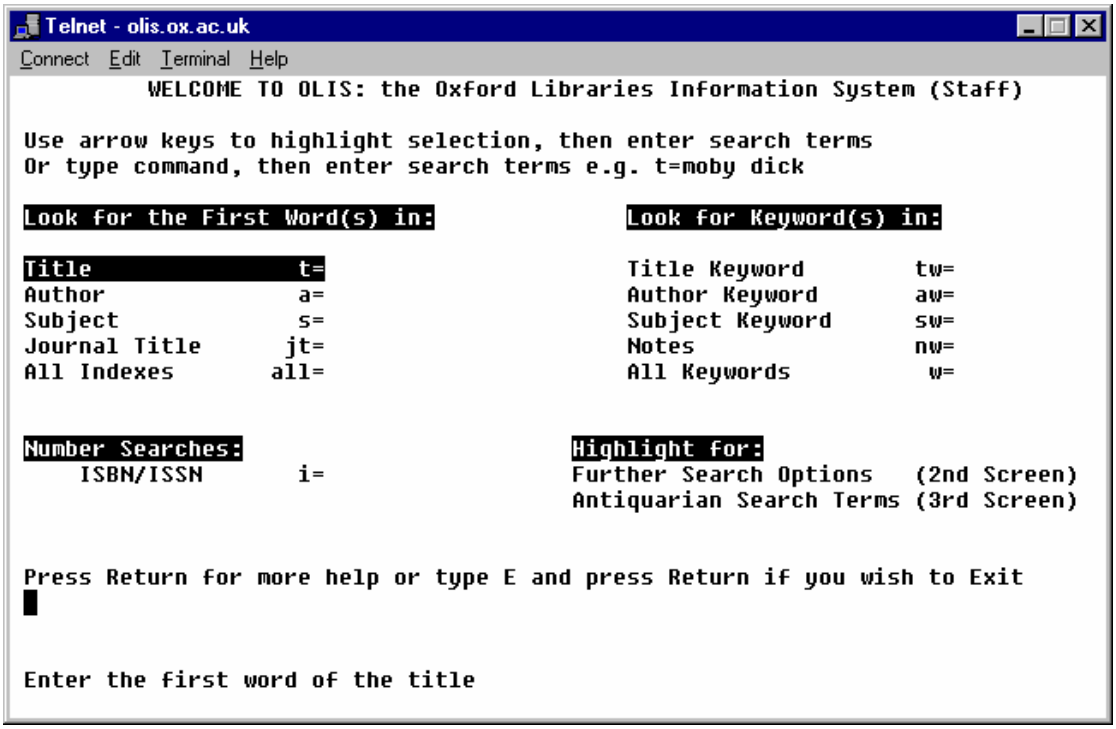
Telnet - olis.ox.ac.uk
Connect Edit Terminal Help
WELCOME TO OLIS: the Oxford Libraries Information System (Staff)
Use arrow keys to highlight selection, then enter search terms
Or type command, then enter search terms e.g. t=moby dick
Look for the First Word(s) in:
Look for Keyword(s) in:
Title t=
Author a=
Subject s=
Journal Title jt=
All Indexes all=
Title Keyword tw=
Author Keyword aw=
Subject Keyword sw=
Notes nw=
All Keywords w=
Number Searches:
ISBN/ISSN i=
Highlight for:
Further Search Options (2nd Screen)
Antiquarian Search Terms (3rd Screen)
Press Return for more help or type E and press Return if you wish to Exit
Enter the first word of the title

Fig. 4.3: First staff OPAC search screen

Use the arrow keys to move between the indexes or use a search command and term to interrogate the database.

For example:

t = hamlet
a = shakespeare, w

Please see the OLIS OPAC staff pocket reference guides (available from LAS in leaflet form), or the OLIS OPAC reader pocket reference guides (in leaflet form or at http://www.lib.ox.ac.uk/olis/), for full details of searching techniques available.

The staff OPAC search screens can be used at this point to retrieve an item without a (legible) barcode for check out (see 3.21 above), or for ordinary online searching.

To exit and return to the checkout screen type **e** and press **<Return>** from any of the initial staff OPAC search screens.

cd= change the checkout date for next individual *item to be checked out*

By default, the current date and time are used as the checkout date/time in determining the due date/time of items checked out. In the vast majority of checkout transactions, this default should be accepted. However, you may, on rare occasions, wish to use a different *checkout* date/time in a checkout transaction, for instance to test that aspects of your circulation setup have been completed as desired, or in the event of a problem with a circulation backup or self-issue upload from previous dates/periods. Use the following guidelines to specify such a different date/time for a specific loan.

[NB: if you need to specify a checkout date/time different from the current for a series of transactions, it is possible to enter such a date/time to be effective for an entire session; see above 3.7-8]

Step 1

At the item prompt, type the command **cd** and press **<Return>**. The following prompt will appear:

```
Checkout Date :
```

Step 2

Enter the date which you wish to be effective as the checkout date for the *next* loan and press **<Return>**. The formats DD/MM/YY, DD.MM.YY, DD-MM-YY, etc. will all be accepted by OLIS at this point (as well as formats including four digits for the year), although there is no need to enter the year if you wish to use a date in the current year. If you are happy to use the current date at check out for the checkout session (i.e., if you only wish to use a *time* different from the default), just press **<Return>** at this prompt.

Step 3

The prompt:

```
Checkout Time :
```

will then appear. Enter the time which you wish to be effective for the next loan in the format HHMM or HH:MM, and then press **<Return>**. If you are happy for the current time to be used (on whatever date you have entered previously, just press **<Return>**.

The date and/or time that you have entered will display at the top of your checkout screen in brackets. If the **due** command (see below) has been used to specify a due date/time for the session/item before this **cd** command is used to alter the check out date and/or time, any check out date and/or time you enter which is later than the entered due date/time will not be effective.

due= change the due date and time for the next individual *item to be checked out*

By default, the current date and time, or any date and time you have specified to be used as the checkout date/time, are used as in conjunction with your library's setup tables to calculate the due date/time of items checked out. In the vast majority of

checkout transactions, this default should be accepted. However, you may, on rare occasions, wish to use a specified *due* date and perhaps also time in a checkout transaction, for instance in the event of special circumstances, or in the event of a problem with a circulation backup or self-issue upload from previous dates/periods. Use the following guidelines to specify such a different date/time.

[NB: if you need to specify a due date/time different from the current for a series of transactions, it is possible to enter such a date/time to be effective for an entire session; see above 3.8-9].

Step 1

At the checkout item prompt, type the command **due** and press **<Return>**. The following prompt will appear:

```
Checkout Due Date :
```

Step 2

Enter the date which you wish to be effective as the due date for the next loan and press **<Return>**. The formats DDMMYY, DD.MM.YY, DD-MM-YY, etc., will all be accepted by OLIS at this point (as well as formats including four digits for the year), although there is no need to enter the year if you wish to use a date in the current year.

Step 3

The prompt:

```
Checkout Due Time :
```

will then appear. Enter the time which you wish to be effective for the next loan in the format HHMM or HH:MM, and then press **<Return>**. If you are happy for the default time to be used (on whatever date you have entered previously, just press **<Return>**). Please note that any due time you enter will *not* be effective *unless* you have entered a due date at the previous prompt.

The date and/or time that you enter will display near the top of your checkout screen (beneath the borrower's details). If the **cd** command (see above) has been used to specify a checkout date/time for the session/item before the **due** command is used to alter the due date and time, you will not be able to enter a due date and time earlier than the entered checkout date/time.

it = display items on loan to the retrieved borrower

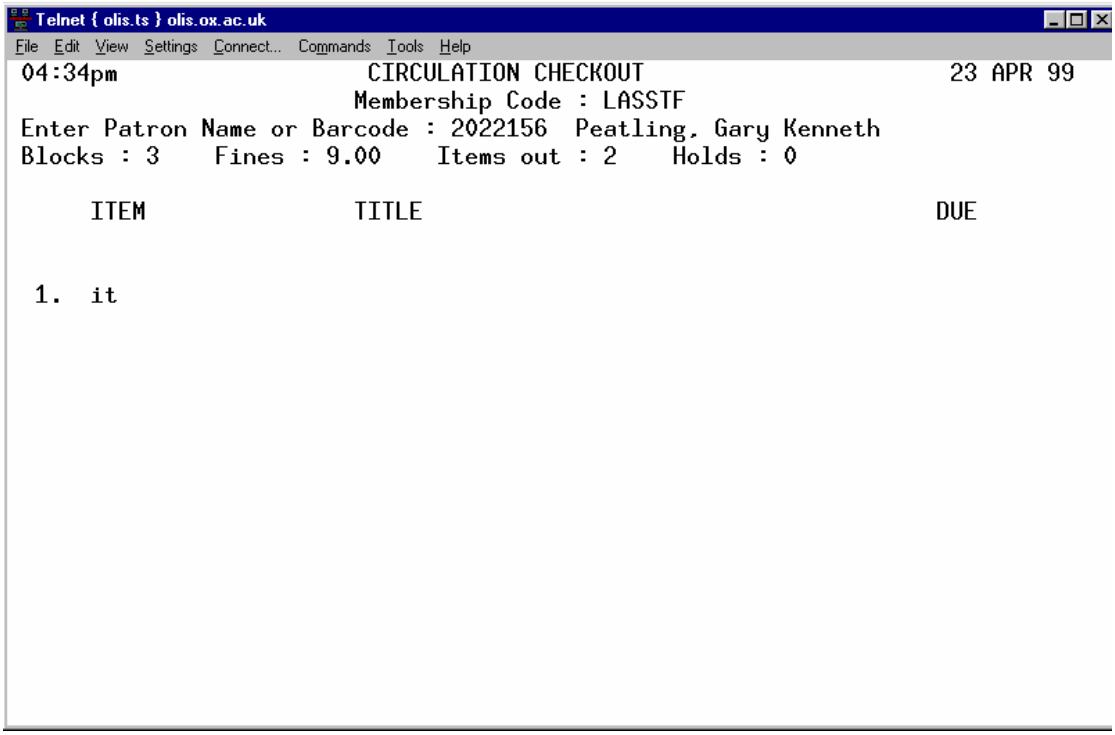
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
04:34pm CIRCULATION CHECKOUT 23 APR 99
Membership Code : LASSTF
Enter Patron Name or Barcode : 2022156 Peatling, Gary Kenneth
Blocks : 3 Fines : 9.00 Items out : 2 Holds : 0
ITEM TITLE DUE
1. it

Fig. 4.4: Command **it** at the item prompt

If the borrower status line indicates that the current borrower has any items out on loan, typing **it** at the item prompt and pressing **<Return>** will display a screen similar to the following:

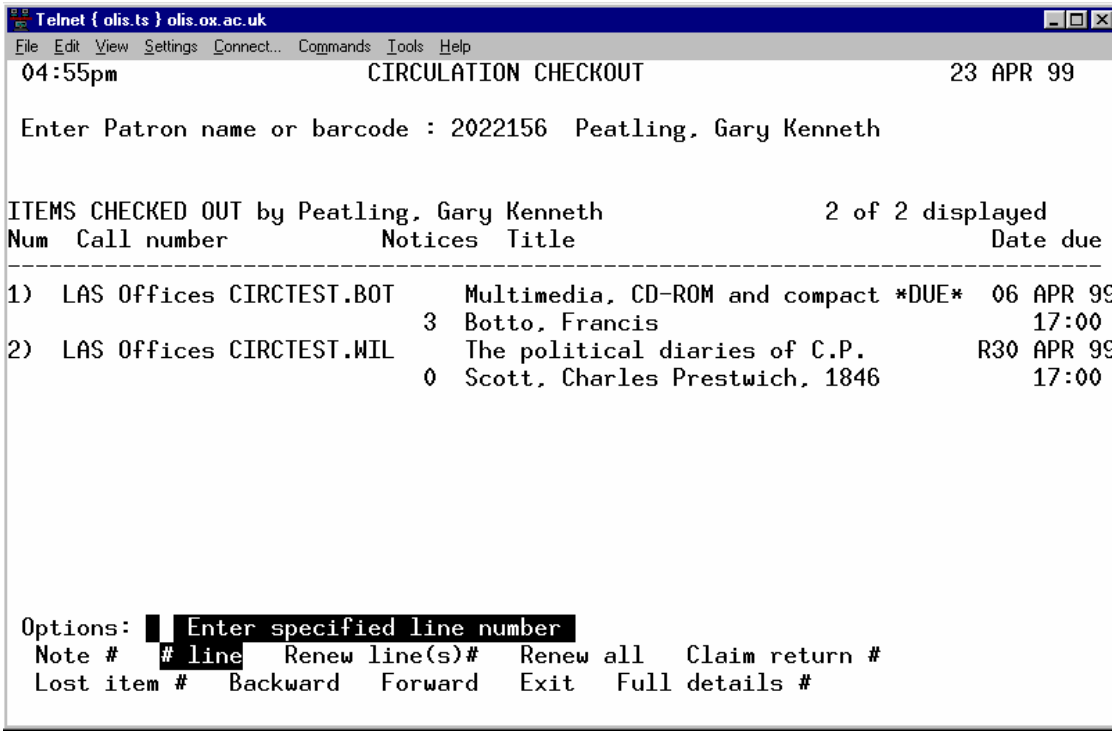
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
04:55pm CIRCULATION CHECKOUT 23 APR 99
Enter Patron name or barcode : 2022156 Peatling, Gary Kenneth
ITEMS CHECKED OUT by Peatling, Gary Kenneth 2 of 2 displayed
Num Call number Notices Title Date due
1) LAS Offices CIRCTEST.BOT Multimedia, CD-ROM and compact *DUE* 06 APR 99
3 Botto, Francis 17:00
2) LAS Offices CIRCTEST.WIL The political diaries of C.P. R30 APR 99
0 Scott, Charles Prestwich, 1846 17:00
Options: Enter specified line number
Note # # line Renew line(s)# Renew all Claim return #
Lost item # Backward Forward Exit Full details #

Fig. 4.5: Reader's item list, accessed via check out

From this screen it is possible to:

- Select the **Forward** option and press **<Return>** to see details of any further items the reader has checked out, if these go onto (a) further screen(s). It this then possible to scroll back up this list of items by selecting the **Backward** option and pressing **<Return>**.
- Display the piece record of any of these items, by selecting the **# line** option, typing the line number of the item concerned, and pressing **<Return>**.
- Add a note to any of the listed items which will display when the item is checked in (see below, 4.11-2).
- Renew one, some or all of the items currently checked out to the reader (see above, 3.26-7)
- Flag any of these items as lost (see below, 4.14-5).
- Flag any of these items to indicate that the reader claims to have returned them (see below, 4.13-5).
- Select the **Exit** option and press **<Return>** to go back to the checkout item prompt.
- Access a screen displaying further details of any of these loans. To look at this screen, select the **Full details #** option, type the line number of the loan in which you are interested and press **<Return>**. A screen similar to the following will then display:

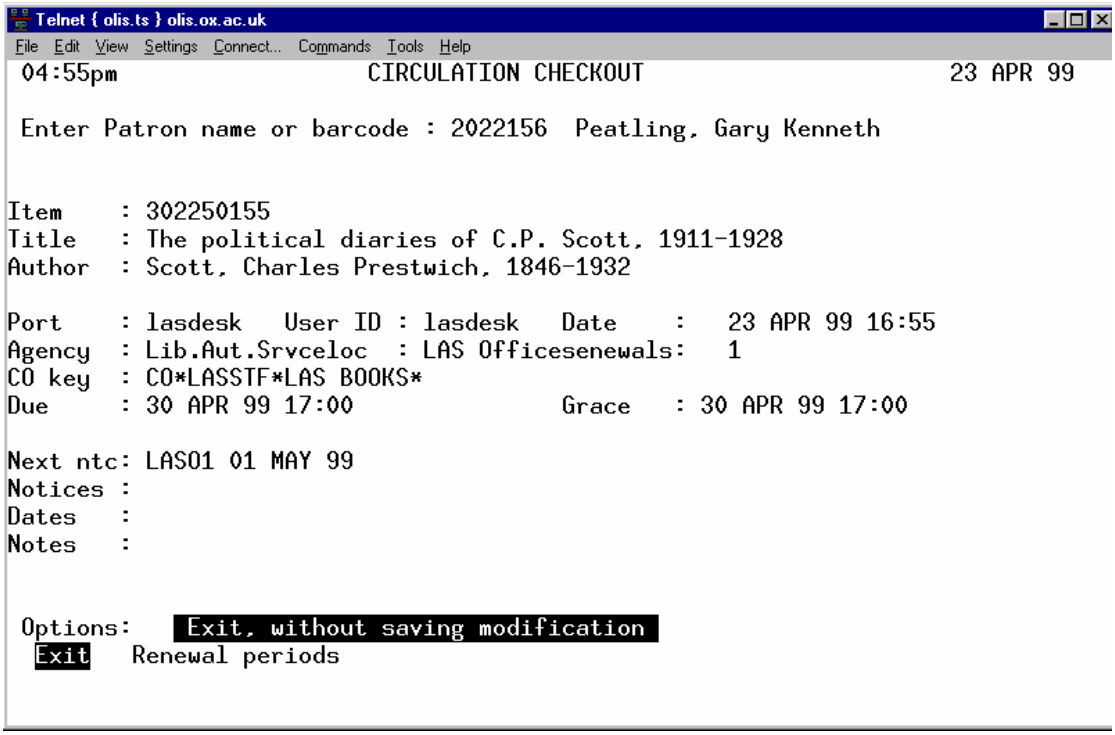
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
04:55pm CIRCULATION CHECKOUT 23 APR 99
Enter Patron name or barcode : 2022156 Peatling, Gary Kenneth
Item : 302250155
Title : The political diaries of C.P. Scott, 1911-1928
Author : Scott, Charles Prestwich, 1846-1932
Port : lasdesk User ID : lasdesk Date : 23 APR 99 16:55
Agency : Lib.Aut.Srvceloc : LAS Officesenewals: 1
CO key : CO*LASSTF*LAS BOOKS*
Due : 30 APR 99 17:00 Grace : 30 APR 99 17:00
Next ntc: LAS01 01 MAY 99
Notices :
Dates :
Notes :
Options: Exit, without saving modification
Exit Renewal periods

Fig.4.6: Full details screen for an individual loan, viewed from a reader's item list

The due date and time and the end date and time of any grace period will be displayed on this screen, respectively in the fields labelled **Due:** and **Grace:**. The notice code of any overdue, courtesy or recall notice due to be generated next for this loan, and the date on which it is due to be generated, will be displayed in the **Next ntc:** field. Any notices which have already been generated in connection with this loan will appear in the **Notices:** field. These two fields may be useful in explaining why an overdue

notice expected for a loan has not appeared (overdue notice codes are explained in Circulation Set Up Manual, 2a.2-9). Any notes added to the item which will be displayed when the item is checked in will appear in the field labelled **Notes:**.

If the loan has not been renewed, this screen will be for display only: press **<Return>** to go back to the reader's item list. However, if the item has been renewed through staff or remotely by the reader, a **Renewal periods** option will appear on the option bar. Select this and press **<Return>** and a screen containing details of renewals similar to the following will display:

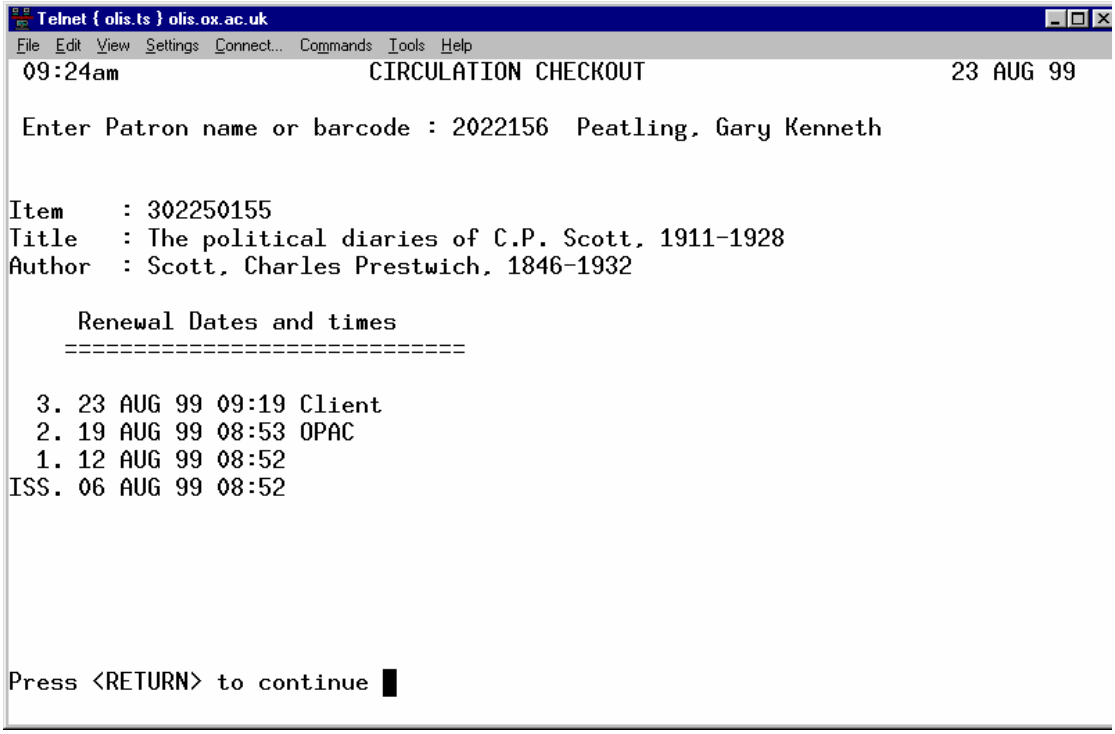
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
09:24am CIRCULATION CHECKOUT 23 AUG 99
Enter Patron name or barcode : 2022156 Peatling, Gary Kenneth
Item : 302250155
Title : The political diaries of C.P. Scott, 1911-1928
Author : Scott, Charles Prestwich, 1846-1932
Renewal Dates and times
3. 23 AUG 99 09:19 Client
2. 19 AUG 99 08:53 OPAC
1. 12 AUG 99 08:52
ISS. 06 AUG 99 08:52
Press <RETURN> to continue

Fig. 4.7: Renewal periods screen for an individual loan, accessed from a reader's item list

It may be useful to refer to this screen to find out how many times a loan has been renewed by a reader, at what times and dates it has been renewed, and the method(s) used to renew it. "ISS" indicates the date and time at which an item was initially checked out, whereas a number in the same column indicates a renewal. "OPAC" on such a line indicates a renewal via the OLIS OPAC, "Client" indicates a renewal via an OPAC client such as GeoWeb, while a blank space in this column indicates a transaction (either a renewal or an original check out) through staff. This list of transactions will always display in reverse chronological order.

Press **<Return>** at this point to go back to the Full details screen. If you wish then to go back to the checkout item prompt, select **Exit** and press **<Return>** twice.

h = allows staff to issue or review holds for a borrower

Type **h** and press **<Return>** from the item prompt at check out to access the holds (or reservations) screens for the retrieved borrower. From here you may place a new reservation for the reader, or display and, if desired, edit or cancel (any of) their existing reservation(s). See 7.3-23 below for details.

b= displays all borrower blocks

Type **b** (or **bl**) and press **<Return>** from the item prompt at check out to display the blocks screen for the retrieved borrower. If desired, you may add, edit or delete blocks through this screen. See ch.6a below for details.

p= displays the borrower record

Type **p** and press **<Return>** to see the borrower record of the retrieved borrower, which will appear similar to the following screen:

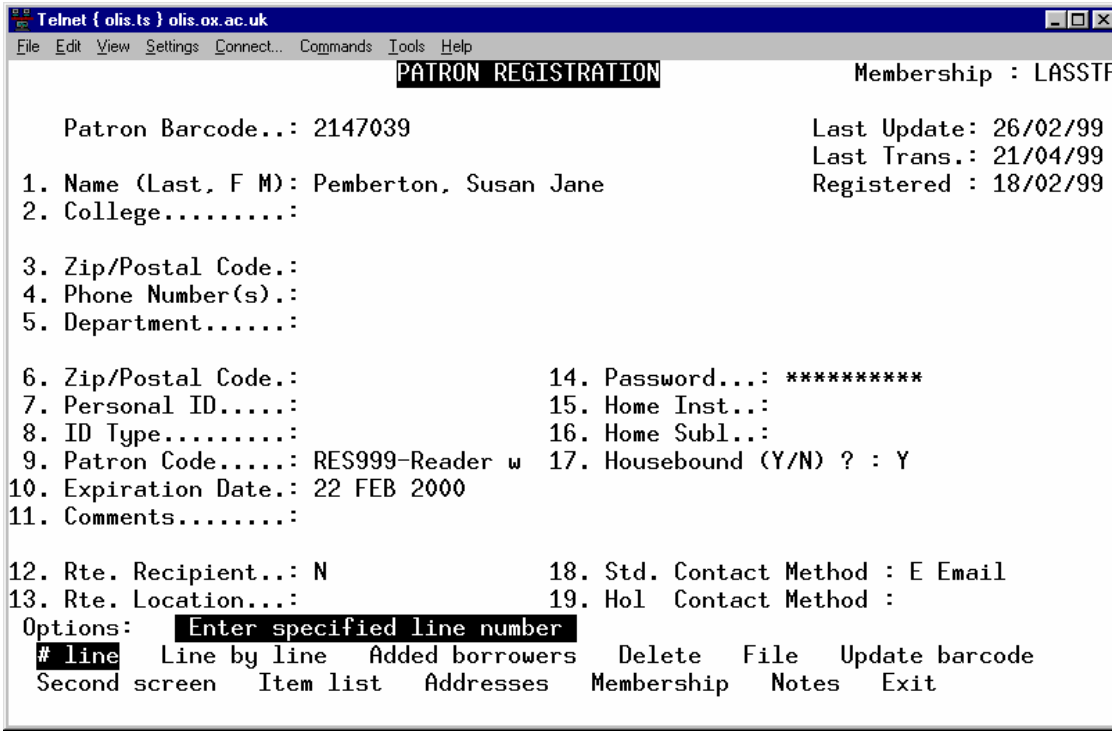
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
PATRON REGISTRATION
Membership : LASSTF
Patron Barcode..: 2147039
Last Update: 26/02/99
Last Trans.: 21/04/99
1. Name (Last, F M): Pemberton, Susan Jane
Registered : 18/02/99
2. College.....:
3. Zip/Postal Code.:
4. Phone Number(s).:
5. Department.....:
6. Zip/Postal Code.:
14. Password...: **********
7. Personal ID.....:
15. Home Inst..:
8. ID Type.....:
16. Home Subl..:
9. Patron Code.....: RES999-Reader w
17. Housebound (Y/N) ? : Y
10. Expiration Date.: 22 FEB 2000
11. Comments.....:
12. Rte. Recipient..: N
18. Std. Contact Method : E Email
13. Rte. Location...:
19. Hol Contact Method :
Options: Enter specified line number
line Line by line Added borrowers Delete File Update barcode
Second screen Item list Addresses Membership Notes Exit

Fig. 4.8: Patron Registration screen, accessed through check out

Changes may be made to the borrower record at this point, either in this screen or any of the connecting screens accessible via the option bar (see 1.9-33 and 2.8-19 above on editing and updating the borrower record). Please remember to select **File** and press **<Return>** to save your changes when going back to the check out screen.

in = leads to the checkin screen

Type **in** and press **<Return>** to go to the checkin screen (See ch.5). When you have finished checking items in, pressing **<Return>** will take you back to the checkout screen for the last borrower retrieved *from within checkout*.

Adding item notes

You might wish to append a note to an item which has (just) been checked out, so that the note will display to the member of staff who checks it in on its eventual return to the library - for example, if the item was damaged prior to check out (both in order to remind staff to repair it and to draw attention to the fact that the damage is not the current borrower's fault). There are two ways to do this:

Method 1, n = note at check out

Step 1

If the item was the last checked out and you are still in the checkout screen for the same borrower, type **n** at the next item prompt and press **<Return>**. An editing window similar to the following will appear:

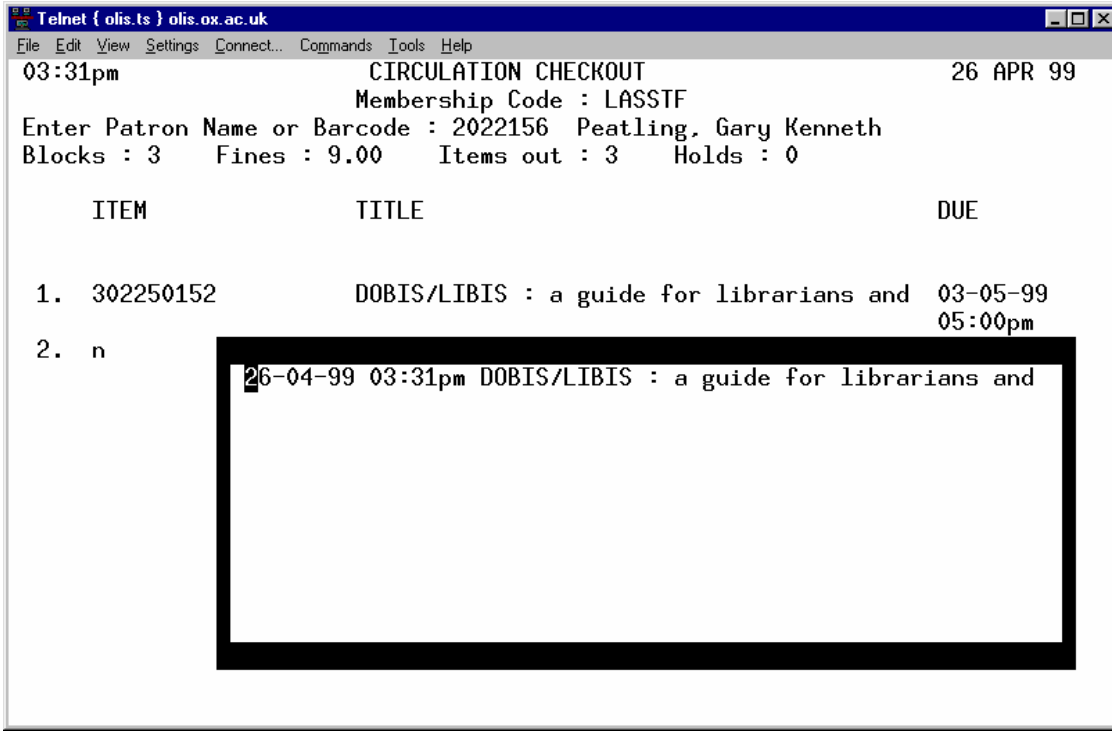
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
03:31pm CIRCULATION CHECKOUT 26 APR 99
Membership Code : LASSTF
Enter Patron Name or Barcode : 2022156 Peatling, Gary Kenneth
Blocks : 3 Fines : 9.00 Items out : 3 Holds : 0
ITEM TITLE DUE
1. 302250152 DOBIS/LIBIS : a guide for librarians and 03-05-99 05:00pm
2. n
26-04-99 03:31pm DOBIS/LIBIS : a guide for librarians and

Fig. 4.9: Checkout note window

Step 2

Type in the window any note which you wish to appear at check in. When you have finished entering the note and are ready to exit the window, type **<Esc>** and then **<e>**.

Step 3

The following prompt will then display:

Do you want to save changes to note (Y/N)?

Type **y** and press **<Return>** to save the note.

Note that in this case the command is entered just *after* you have checked out the item to which you wish it to apply.

Method 2, Note # option from a reader's item list

If you have missed this opportunity to add a note (either because you have left the checkout screen for the relevant borrower or have checked out further items to them), you may add notes to be associated with specific loans through the reader's item list.

Step 1

If the relevant borrower record is not already retrieved at check out, wand in the borrower's barcode at the checkout borrower prompt or otherwise retrieve their borrower record at checkout (see 3.5 for options).

Step 2

Type **it** at the item prompt and press **<Return>**.

Step 3

Locate the item to which you wish to add a note on the reader's item list. Then select the **Note #** option, type in the line number of the item concerned and press **<Return>**. An editing window will appear, in which you may type the note that you wish to display when the item is checked in.

Step 4

Type **<Esc><e>** to exit this window. The following prompt will then display:

```
Do you want to save changes to note (Y/N)?
```

Type **y** and press **<Return>** to save the note.

An example of the display of notes at check in is shown on 5.20 below.

ap = accept a fine payment

Type **ap** and press **<Return>** at the item prompt at check out to access the *Accounts Receivable* screen for the current borrower. Here the payment and waiving of current fines may be registered, and the borrower's Account History may be viewed. (See 6.10-8, 21-4).

Invalid entry

If you mistype one of the available commands at check out, the following message will display:

```
Invalid entry. Type "?" for help or press <ENTER> to continue :
```

Wanding in a reader barcode at the checkout item prompt

If you have retrieved one borrower record through check out, it is possible to access a second borrower record in order to check items out to a different reader without returning to the checkout borrower prompt, simply by wanding through the reader barcode (not typing in their name) at the item prompt:

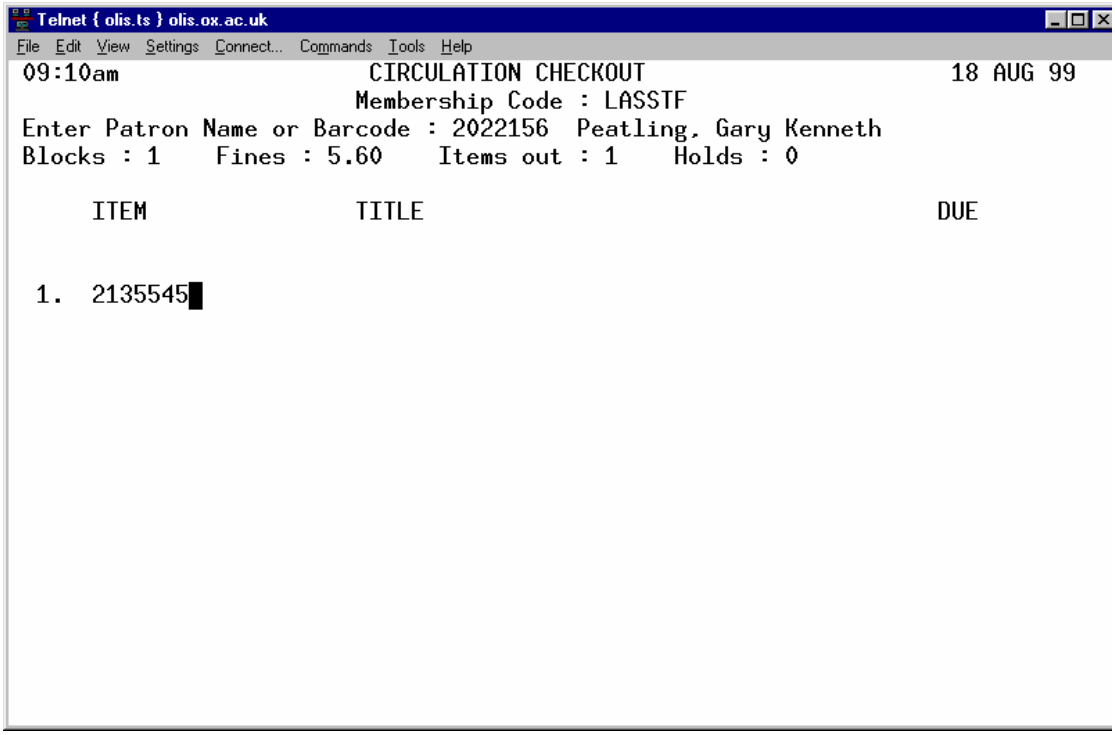
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
09:10am CIRCULATION CHECKOUT 18 AUG 99
Membership Code : LASSTF
Enter Patron Name or Barcode : 2022156 Peatling, Gary Kenneth
Blocks : 1 Fines : 5.60 Items out : 1 Holds : 0
ITEM TITLE DUE
1. 2135545

Fig. 4.10: Borrower barcode entered at the checkout item prompt

However, this will mean that OLIS will still use the time from when you were last at the checkout borrower prompt in calculating due dates. If your library does not use booking patterns or hourly loan periods, this is unlikely to make any difference and wanding in reader barcodes at the item prompt may be a useful shortcut; but if you do use booking patterns or hourly loan periods or are in any doubt, we advise that you go back to the checkout borrower prompt to retrieve a new borrower.

Claimed returns

If a borrower claims that they have returned an item which is still registered as checked out to them *on OLIS*, it is possible to note this fact on OLIS by flagging the item as *claimed return*. This is done from the reader's item list accessible from the check out (**cout**) screen. Please note that OLIS will still calculate overdue fines for items which have been flagged claimed returned, so if the item is eventually checked in, overdue charges will be levied against the reader. Libraries may wish, at their discretion, to waive such charges or insist on their being paid.

Adding a claimed return flag to an item

Step 1

If you are not already in the checkout screen, select the option for or type **cout** from any menu in the circulation module and press **<Return>**. The following prompt will appear:

Enter Patron Name or Barcode:

Step 2

Wand in the borrower barcode and press **<Return>** (see also 3.5 for other ways of retrieving a borrower record at check out). The circulation checkout screen will appear.

Step 3

At the item prompt, type **it** and press **<Return>**. The item list for the retrieved borrower will appear.

Step 4

Select the **Claim return #** option on the option bar at the bottom of the screen, type in the line number of the item you wish to flag as claimed return (e.g., **2**) and press **<Return>**. A *Claimed Return* status will appear in the *Due date* column (see fig. 4.11 below), and also in the status field on the piece record on the staff side of OLIS. On the OPAC, the status of an item which has been flagged as claimed return will display as *Missing/Search*.

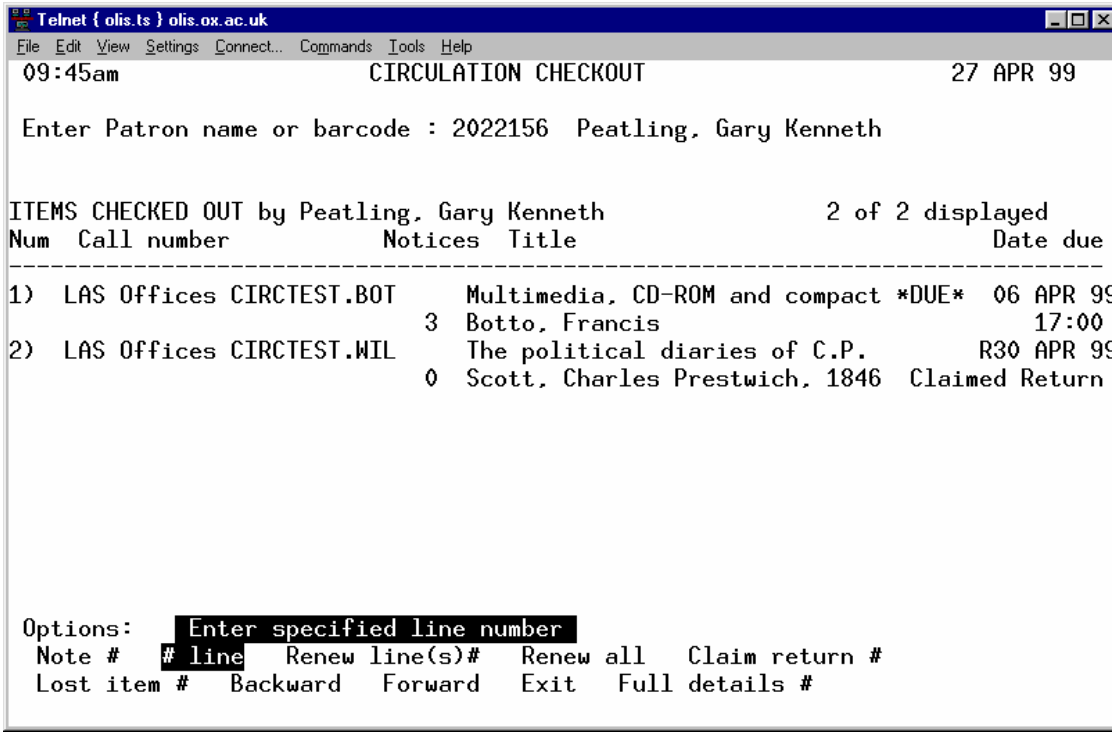
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
09:45am CIRCULATION CHECKOUT 27 APR 99
Enter Patron name or barcode : 2022156 Peatling, Gary Kenneth
ITEMS CHECKED OUT by Peatling, Gary Kenneth 2 of 2 displayed
Num Call number Notices Title Date due
1) LAS Offices CIRCTEST.BOT Multimedia, CD-ROM and compact *DUE* 06 APR 9
3 Botto, Francis 17:00
2) LAS Offices CIRCTEST.WIL The political diaries of C.P. R30 APR 9
0 Scott, Charles Prestwich, 1846 Claimed Return
Options: Enter specified line number
Note # # line Renew line(s)# Renew all Claim return #
Lost item # Backward Forward Exit Full details #

Fig. 4.11: Claimed Return flag on a reader's item list

Deletion of a claimed return flag at Checkin

If an item *claimed return* is found (either by staff or by the reader), it can be checked back in as normal. This will automatically change the item status from claimed return back to the default for your library (i.e., *Available* or blank).

NB: Each library can establish a maximum for the number of items which readers in each of their patron memberships can claim to have returned in the table CPMC (see Circulation Set Up Manual 7.23). If this maximum is exceeded, the reader will be placed on administrative hold, and will be prevented from checking out or renewing items (please see below 6a.16-7 on administrative holds). The application of this maximum however is *not* controlled by the claimed return flag described above, but by the Claimed Returned *block*. To apply such a maximum, it would thus be necessary to attach a Claimed Returned block to the patron record of a reader who claimed to have returned (an) item(s) (see 6a.4-9). One might wish to flag the item claimed return *as well* in order to give a more meaningful display of the item's current status on the OPAC.

Lost items

If a borrower reports that they have lost an item which is still registered as checked out to them on OLIS, it is possible to note this fact by flagging the item as lost in a similar way to claimed returns. This is again done from the reader's item list when accessed from the check out (**cout**) screen; select the option **Lost #**, type in the line number of the item you wish to flag as lost, and press **<Return>**. The item 's status will appear as *Billed as Lost* in the due date column of the item list, and on the piece record display on the staff side of OLIS, while the OPAC status will appear as *Missing*. The status will again automatically be changed back to the default for your library if the item is checked back in.

In the case of a lost item, you may again wish to attach a lost item block to a reader's record in addition to/instead of the item being flagged as lost in the reader's item list. The lost item block enables one to enter a financial amount to be charged against the reader, e.g., to replace the lost item. An outstanding charge of the librarian's discretion can thus be linked to the reader's record until payment (or waiving) is registered (see 6a.9-11 on adding such a block, and ch.6, especially 6.19, on fines).

Added Borrowers

Added borrowers are usually added in the process of borrower registration (see above 1.30-2), but may also be added through the checkout screen. If a borrower record with added borrowers is retrieved at the check out screen a list of current added borrowers will be displayed in a screen similar to the following:

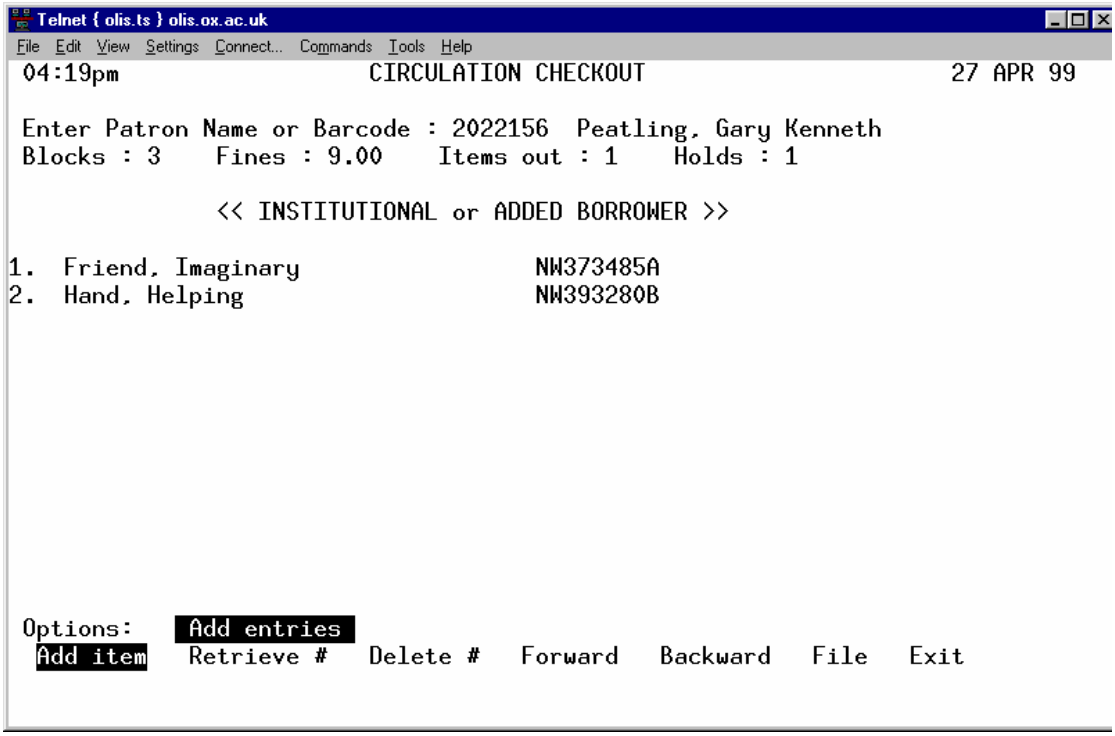
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
04:19pm CIRCULATION CHECKOUT 27 APR 99
Enter Patron Name or Barcode : 2022156 Peatling, Gary Kenneth
Blocks : 3 Fines : 9.00 Items out : 1 Holds : 1
<< INSTITUTIONAL or ADDED BORROWER >>
1. Friend, Imaginary NW373485A
2. Hand, Helping NW393280B
Options: Add entries
Add item Retrieve # Delete # Forward Backward File Exit

Fig. 4.12: Added borrowers screen at check out

Added borrowers added by any library at which the reader has borrowing privileges will be displayed at this point, but it is up to the discretion of individual libraries as to whether they will allow added borrower(s) to check items out on behalf of the registered borrower, or whether they will only check items out to the borrower in person.

If you wish to check (an) item(s) out to the added borrower on behalf of the registered borrower, select the **Retrieve #**, type the line number of the added borrower, and press **<Return>**. The added borrower's name appears in brackets next to the name of the registered borrower on the checkout screen, and items may then be checked out as normal. Note that all loans made to an added borrower remain the responsibility of the registered borrower.

If you wish to check (an) item(s) out directly to the registered borrower, select the **Exit** option from the above added borrowers screen at check out (Fig. 4.12) and press **<Return>**. The ordinary checkout screen will then display.

If you wish to link a new added borrower to this record, select the **Add item** option and press **<Return>**. The process of adding borrowers through check out is virtually identical to that through the borrower registration screen (see above 1.30-2): you will be prompted to enter a name and then an ID for the added borrower, and will then need to select the **File** option and press **<Return>** to save the new added borrower. This will take you through to the item prompt with the registered borrower retrieved.

If you wish to delete a current added borrower via the added borrowers screen at check out, select the **Delete #** option, type in the line number of the added borrower you wish to delete and press **<Return>**. Again you will then need to select the **File**

option and press **<Return>** to complete the process of deletion. This again will take you through to the item prompt with the registered borrower retrieved.

Registering a new borrower

It is possible (though will rarely be necessary) to register a new borrower through the checkout screen. However, it is *important* to remember to browse the OLIS patron file by name before registering a borrower in this way in order to avoid the risk of duplicates. A new borrower registered through check out will initially be given a negative system-assigned barcode. Such a reader will be unable to borrow until given a physical reader barcode number, but once you have given such a reader a membership in your library, it will be possible to use the **Update barcode** function to do this without leaving check out. Use the following procedure:

Step 1

At the checkout borrower prompt, i.e.:

```
Enter Patron Name or Barcode:
```

type **n** or **new** and press **<Return>**. The following message will appear:

```
Enter Patron name - Surname, Firstname
```

Step 2

Enter the borrower's name in the format indicated. A blank borrower registration (or CPR) screen will appear with a system-assigned negative borrower barcode number.

Step 3

You must enter an address for the borrower in field 2, enter a borrower type (usually RES999) in field 9, and then given the reader a membership at your library. Other fields can be completed/edited at this point or at another time as is desired (registration of a new borrower is explained in more detail at 1.8-16 above).

Step 4

Select the **Update barcode** function and press **<Return>**. At the prompt

```
Enter New Patron Barcode:
```

you may then wand in the reader's physical barcode (from their University or other library card).

Step 5

Select the **File** option and press **<Return>** to save the new borrower record. This will take you through to the checkout screen, and you will be able to check items out to the newly registered borrower if desired.

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Check in

Introduction

The return of a loaned item is registered in OLIS circulation by wanding in the item barcode through the checkin screen. This chapter describes this basic procedure of check in, and explains the commands which can be used at the checkin prompt.

This chapter also lists some exception messages which might appear at the point of check in. These messages will inform staff, for instance, of any fines incurred on overdue items, or if the reader returning the item has certain kinds of block against their name, or if the item has been reserved for another reader.

Checking in returned items

Step 1

If you are not already at the checkin screen, type or select the option for **CIN** from any menu in the circulation module and press **<Return>**. The following screen will appear:

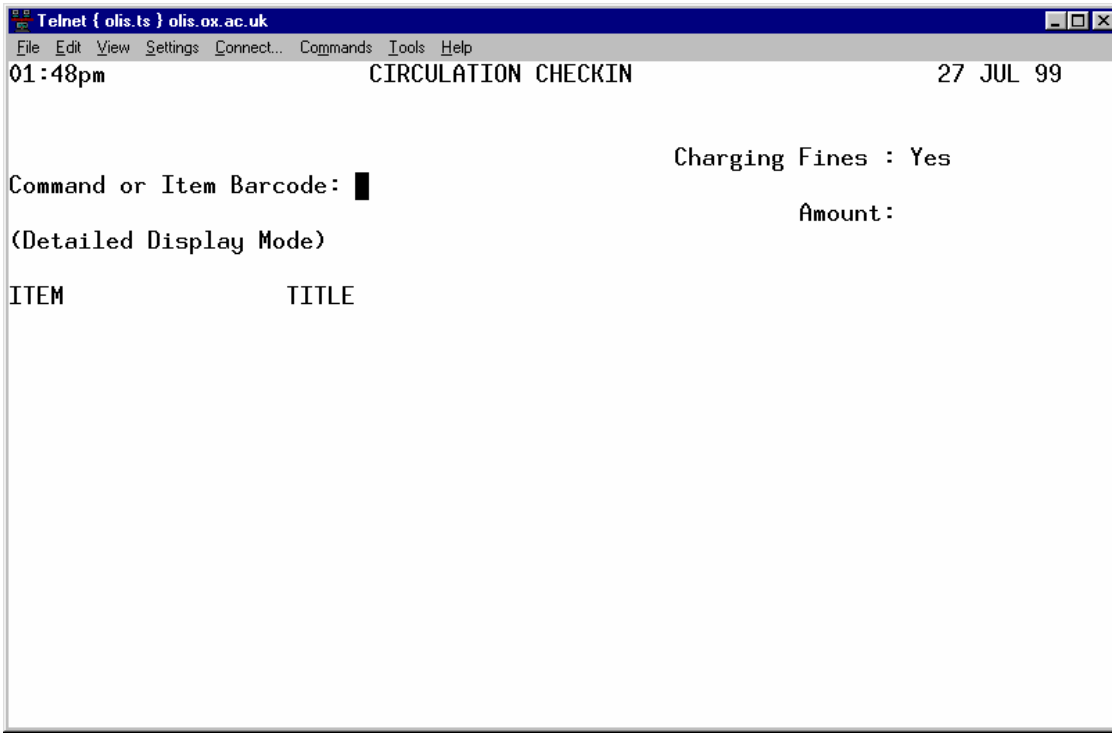
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
01:48pm CIRCULATION CHECKIN 27 JUL 99
Charging Fines : Yes
Command or Item Barcode:
Amount:
(Detailed Display Mode)
ITEM TITLE

Fig. 5.1: Blank Checkin screen

Step 2

At the prompt

Command or Item Barcode:

wand in the barcode of the returned book, or type in the barcode and press <**Return**>. If the item has been properly registered on OLIS as checked out, your screen will appear similar to the following:

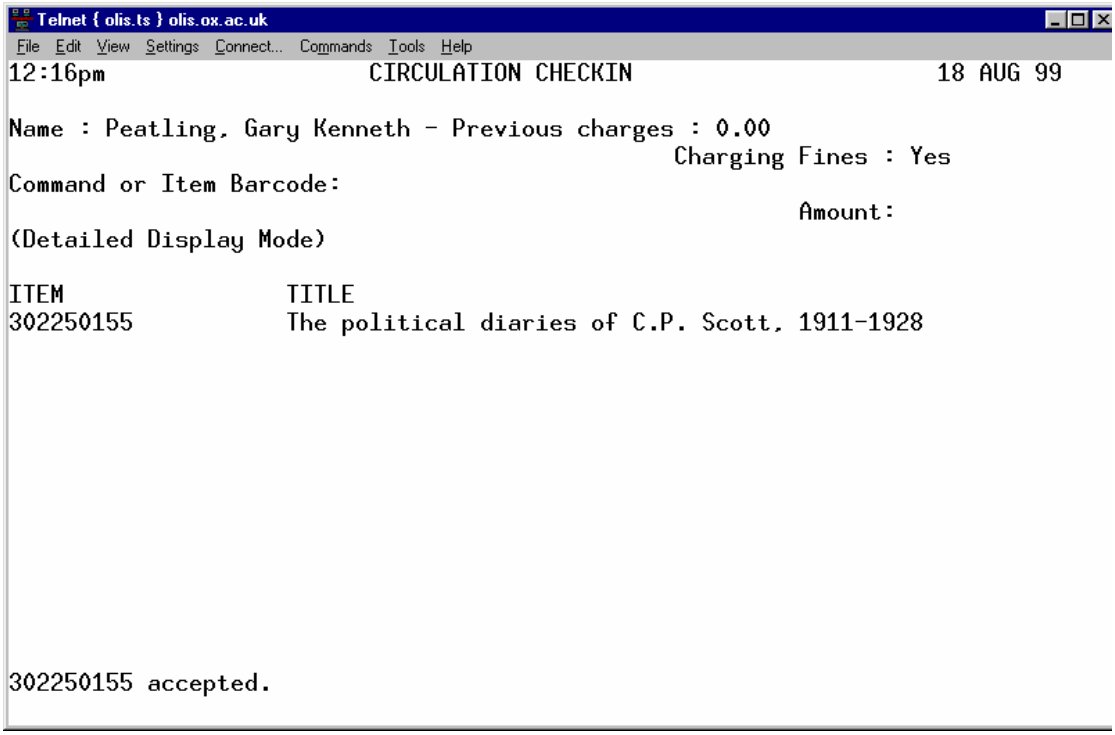
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
12:16pm CIRCULATION CHECKIN 18 AUG 99
Name : Peatling, Gary Kenneth - Previous charges : 0.00
Charging Fines : Yes
Command or Item Barcode:
Amount:
(Detailed Display Mode)
ITEM TITLE
302250155 The political diaries of C.P. Scott, 1911-1928
302250155 accepted.

Fig. 5.2: Checkin screen - item accepted

The name of the reader in whose name the item has just been returned will appear at the top of the screen, and (depending on checkin session settings) the barcode and title of the returned book will also display. The message

30xxxxxx accepted.

will appear at the bottom of the screen. If any fines are owing, these will also display on this check in screen. Please see below (5.9-12, 6.5-10) on how to deal with fines at checkin.

Step 3

The cursor will return automatically to the *command or item barcode* prompt (or *checkin item prompt*). You may now enter the barcode of the next returned book. Details of only one item (i.e., the title and barcode of the last item checked in) can be displayed on the screen at any one time.

Step 4

When you have finished checking in items, simply pressing **<Return>** at the checkin item prompt will take you back to a circulation menu, unless the last reader to check in an item has any fines outstanding, in which case the total of these fines will display. See 6.5-10 on how the payment or waiving of fines may be registered at this point. If you do not wish to register the payment or waiving of any fines here, simply press **<Return>** once more to go back to a circulation menu.

Commands which can be used from Check in

A number of commands can be entered direct from the checkin item prompt.

? for Options

As at checkout, it is possible to type a question mark (**?**) and press **<Return>** at the checkin item prompt in order to display most of the available options:

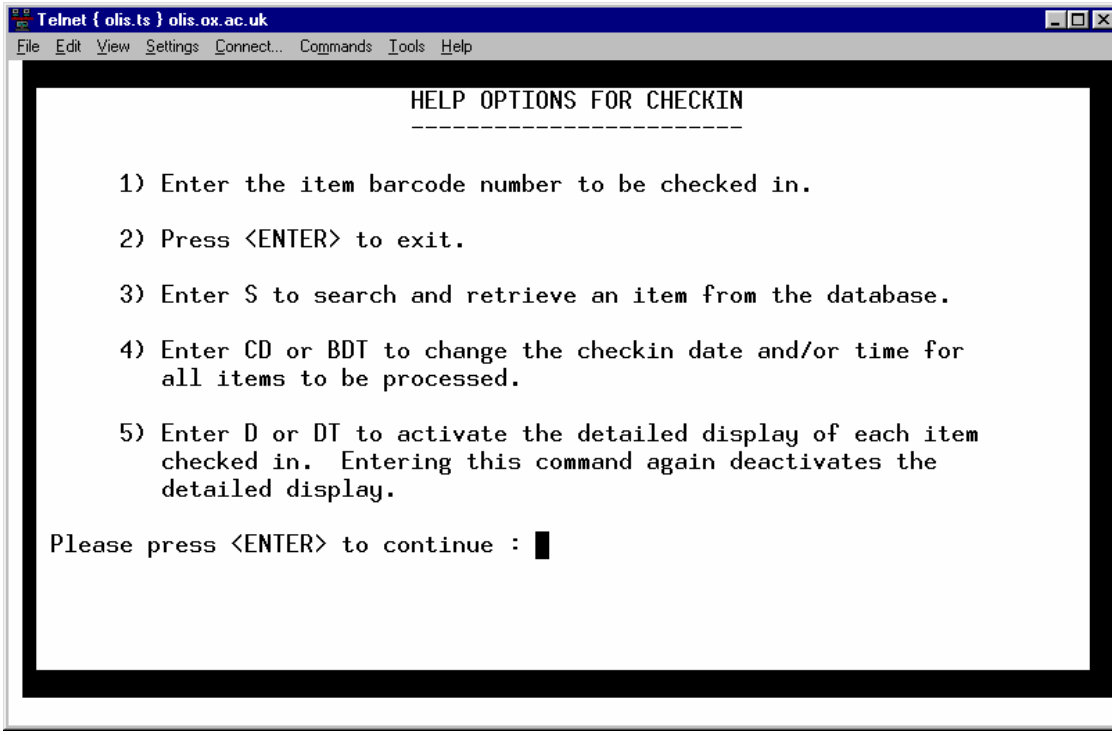
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
HELP OPTIONS FOR CHECKIN
1) Enter the item barcode number to be checked in.
2) Press <ENTER> to exit.
3) Enter S to search and retrieve an item from the database.
4) Enter CD or BDT to change the checkin date and/or time for all items to be processed.
5) Enter D or DT to activate the detailed display of each item checked in. Entering this command again deactivates the detailed display.
Please press <ENTER> to continue :

Fig. 5.3: First Help screen at Check in

Press **<Return>** at this point to see further possible commands:

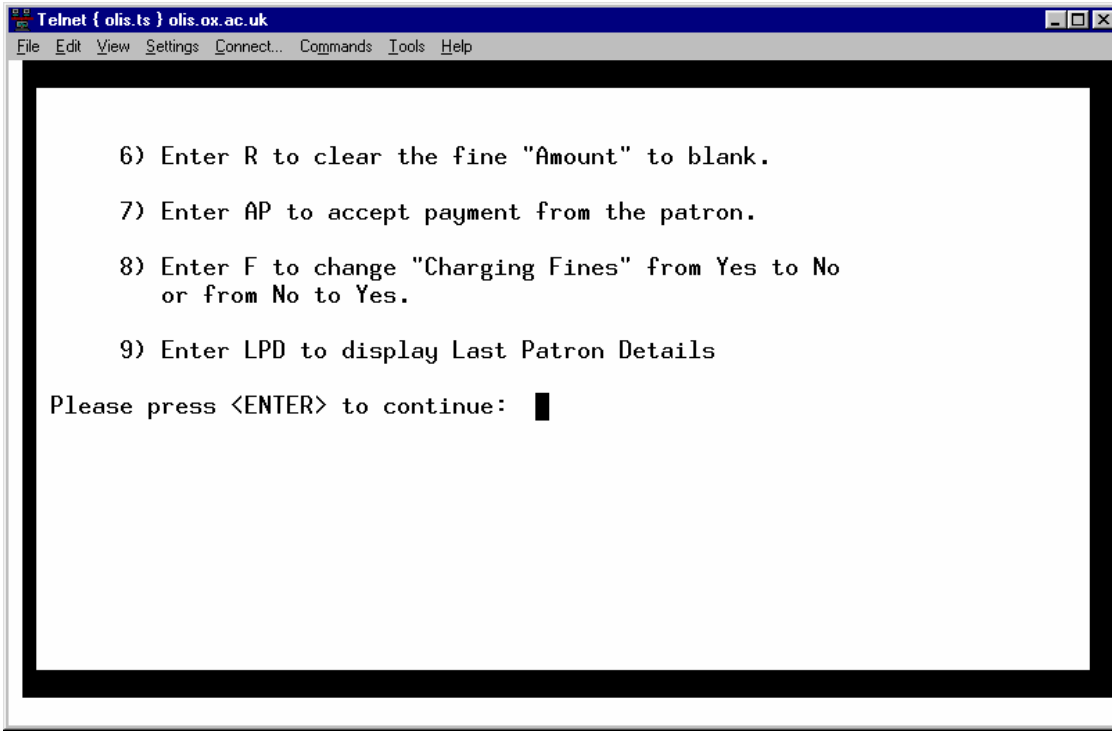
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
6) Enter R to clear the fine "Amount" to blank.
7) Enter AP to accept payment from the patron.
8) Enter F to change "Charging Fines" from Yes to No or from No to Yes.
9) Enter LPD to display Last Patron Details
Please press <ENTER> to continue:

Fig. 5.4: Second Help screen at Check in

Press <Return> to exit Check in

If you wish to leave the checkin screen at any point, just press **<Return>** at the checkin item prompt. This will take you back to a circulation menu, unless the last reader to checkin an item has any fines outstanding, in which case the total of these fines will display. See 6.5-10 on how the payment or waiving of fines may be registered at this point. If you do not wish to register the payment or waiving of any fines here, simply press **<Return>** once more to go back to a circulation menu.

Enter s to search and/or retrieve an item from OLIS

As at checkout, it is possible to search OLIS from the checkin item prompt by typing **s** and pressing **<Return>**. This again may be useful if the barcode of an item previously catalogued on OLIS has fallen out or cannot be read by the barcode reader, as searching for and retrieving the piece record will enable you to check the item in.

Type **s** at the item prompt and press **<Return>** and the first staff OLIS OPAC search screen will appear:

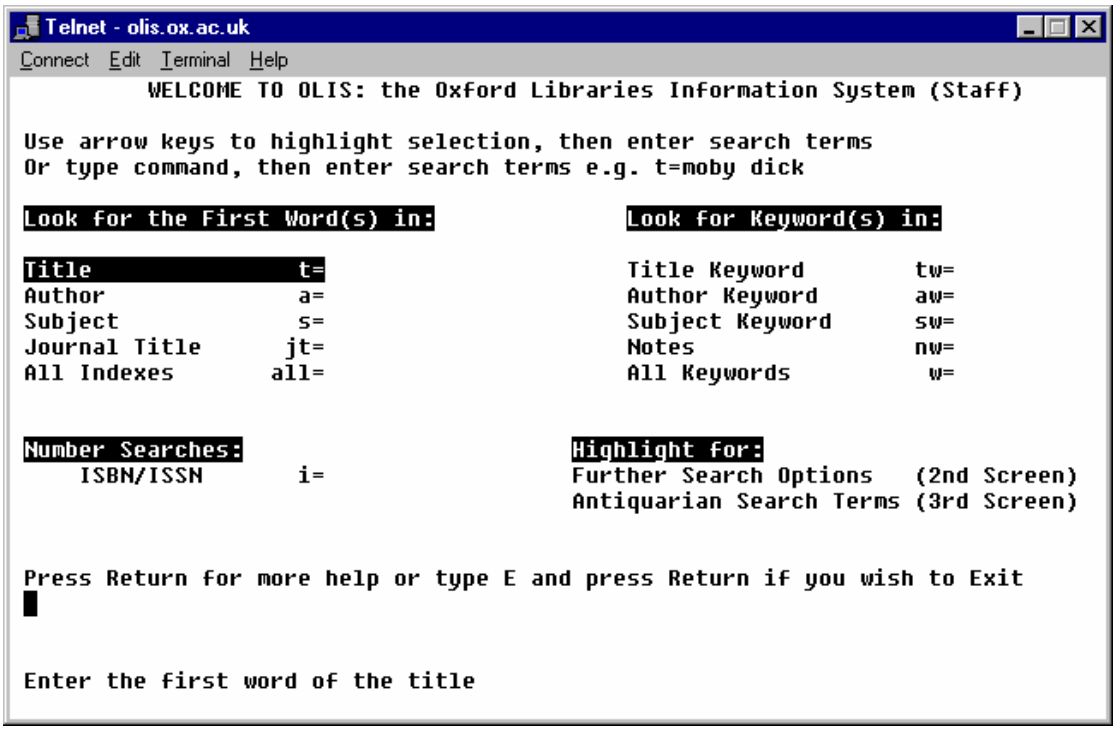
Telnet - olis.ox.ac.uk
Connect Edit Terminal Help
WELCOME TO OLIS: the Oxford Libraries Information System (Staff)
Use arrow keys to highlight selection, then enter search terms
Or type command, then enter search terms e.g. t=moby dick
Look for the First Word(s) in:
Look for Keyword(s) in:
Title t=
Author a=
Subject s=
Journal Title jt=
All Indexes all=
Title Keyword tw=
Author Keyword aw=
Subject Keyword sw=
Notes nw=
All Keywords w=
Number Searches:
ISBN/ISSN i=
Highlight for:
Further Search Options (2nd Screen)
Antiquarian Search Terms (3rd Screen)
Press Return for more help or type E and press Return if you wish to Exit
Enter the first word of the title

Fig. 5.5: First staff OPAC search screen

From here you may use any search command to locate the required title (e.g., t= to browse by title, c= to browse for the shelfmark, or i= to search for the ISBN). Please see the OLIS OPAC staff pocket reference guides (available from LAS in leaflet form), or the OLIS OPAC reader pocket reference guides (in leaflet form or at http://www.lib.ox.ac.uk/olis/). Then access the item display screen for that title.

You should then locate the current copy (*if* necessary by selecting the **Forward** option and pressing **<Return>**). The status of the current copy should be *DUE BACK: DD/MM/YY*. If your library has several on-loan copies of the item, and you have any difficulty working out which is the current copy, access the piece record of any likely

copy (by selecting the **# line** option, typing in the line number of the likely copy and pressing **<Return>**). The current borrower's name, displayed around the middle of the screen at the point indicated in Fig. 5.6, may assist you in distinguishing the correct copy:

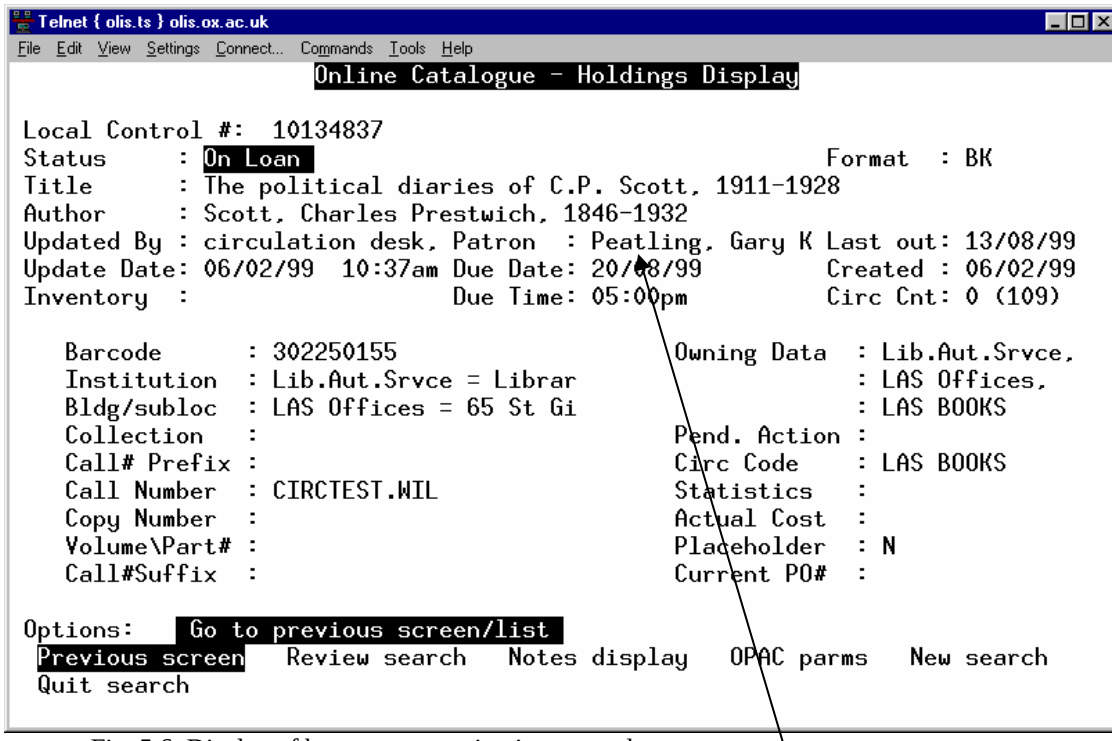
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
Online Catalogue - Holdings Display
Local Control #: 10134837
Status : On Loan Format : BK
Title : The political diaries of C.P. Scott, 1911-1928
Author : Scott, Charles Prestwich, 1846-1932
Updated By : circulation desk, Patron : Peatling, Gary K Last out: 13/08/99
Update Date: 06/02/99 10:37am Due Date: 20/08/99 Created : 06/02/99
Inventory : Due Time: 05:00pm Circ Cnt: 0 (109)
Barcode : 302250155 Owning Data : Lib.Aut.Srvce,
Institution : Lib.Aut.Srvce = Librar : LAS Offices,
Bldg/subloc : LAS Offices = 65 St Gi : LAS BOOKS
Collection : Pend. Action :
Call# Prefix : Circ Code : LAS BOOKS
Call Number : CIRCTEST.WIL Statistics :
Copy Number : Actual Cost :
Volume\Part# : Placeholder : N
Call#Suffix : Current PO# :
Options: Go to previous screen/list
Previous screen Review search Notes display OPAC parms New search
Quit search
Current borrower's name

Fig. 5.6: Display of borrower name in piece record

Once you have located the current copy, select the **Retrieve #** option on the item display screen, then type in the line number of the current copy and press **<Return>**. The item will automatically be checked in.

NB: it will be necessary to affix a new barcode to the item and to enter it in the piece record before loaning it again, or otherwise to check it out next time using the third conversion on-the-fly method, i.e., entering a new barcode into the piece record in the process (see 3.35-6 above).

If you wish to exit the staff OPAC and go back to the checkin screen without retrieving an item for checkin, type **e** and press **<Return>** from any of the initial staff OPAC search screens.

Enter cd or bdt to change the checkin date and/or time for all items to be checked in

The default date and time used by OLIS at check in (e.g., in calculating late return fines) will be the current date and time at the point of check in. You may however change the checkin date and time for the whole checkin session (i.e., *until* you next leave check in) by using the command **cd** or **bdt** at the checkin item prompt. This will rarely be necessary, but may be useful, for instance, if you are registering the return of items which have been left in a returns bin or otherwise returned while no staff have been in your library.

Within checkin, **cd** stands for Change Date and **bdt** means Back Date Time. These can be used interchangeably and have the same effect. When you enter either of these commands at the checkin item prompt, the following prompt will appear:

```
Checkin Date:
```

Enter the date you wish to use during this checkin session and press **<Return>**. The formats DD/MM/YY, DD.MM.YY, DD-MM-YY, etc., will all be accepted by OLIS, as well as formats including a four-digit year (you do not need to enter the year if the desired date falls in the current calendar year), though the entered date will be displayed in the format 29 APR 99. If you just press **<Return>** at this point, the cursor will go back to the item prompt: if you wish to use the current date, but a time different from the current time, you must enter the current date in a format such as DD-MM and then press **<Return>**. OLIS will not accept a date later than the current date. If such a date is entered, an error message similar to the following will appear:

```
Date cannot be greater than current date 15/05/99
```

And the system will prompt for a different checkin date to be entered. Once a valid date has been entered, press **<Return>**. The following prompt will appear:

```
Checkin Time:
```

Press **<Return>** if you are happy to use the current time (on whatever date you have previously entered), otherwise enter a time in the twenty-four-hour format HHMM or HH:MM.

The time and date you have entered will appear at the top of your checkin screen, respectively on the left and the right (where the current time and date usually display), and will remain effective until you exit check in. If you need to change the checkin date and/or time for a single item, use the **bdt** or **cd** commands and then check in the single item. You should then press **<Return>** to exit check in and go back to a circulation menu. If you need to check in further items using the current date/time, you can then go back into check in by typing or selecting the option for **CIN**.

Enter d or dt to activate the simple display of each item checked in

Entering **d** or **dt** at the checkin item prompt will activate the *simple display* mode. This mode will not display the title of items as they are checked in, but will simply display a confirmation (or any appropriate error or warning message). The default detailed display mode (displaying the title of loaned items as they are checked in) can be restored either by entering either of these commands again, or by pressing **<Return>** to exit the session, and then going back into checkin by typing or selecting the option for **CIN**.

[NB: As only one item (the item just checked in) can be displayed at any point at check in, it is less likely that you will find the simple mode useful at check in than at check out.]

Enter r to clear the fine "Amount" to blank

Several pieces of information may display in the checkin screen relating to fines owed by the reader. Each may be based on a slightly different calculation.

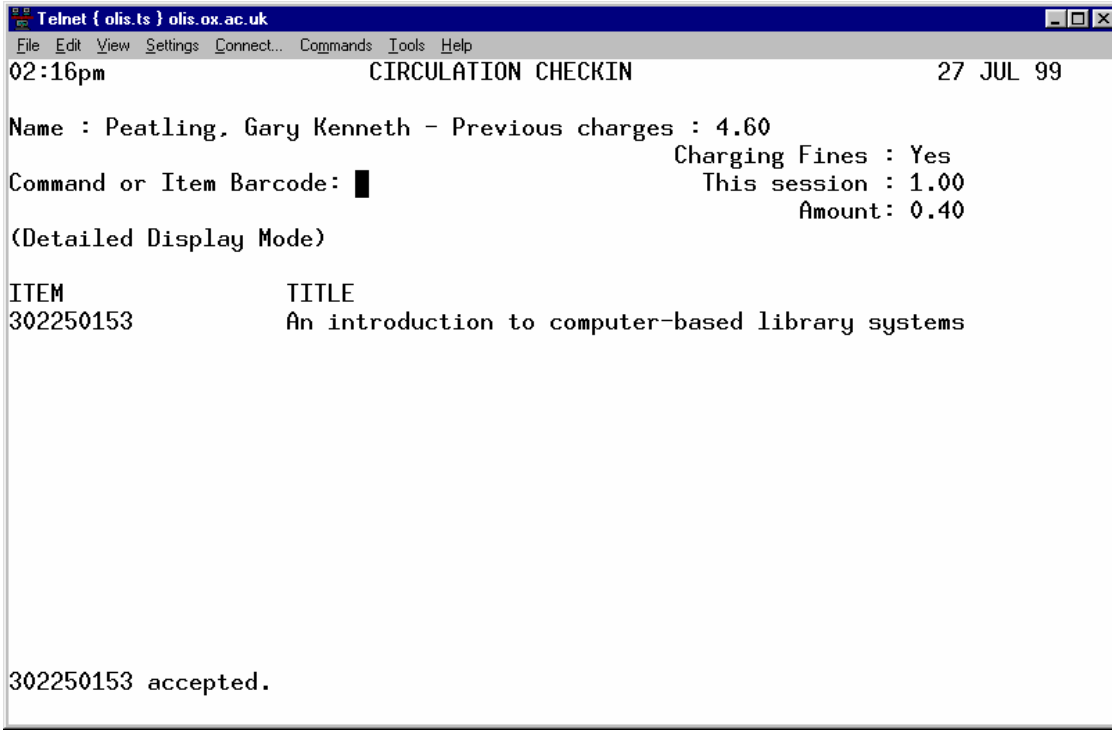
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
02:16pm CIRCULATION CHECKIN 27 JUL 99
Name : Peatling, Gary Kenneth - Previous charges : 4.60
Charging Fines : Yes
Command or Item Barcode:
This session : 1.00
Amount: 0.40
(Detailed Display Mode)
ITEM TITLE
302250153 An introduction to computer-based library systems
302250153 accepted.

Fig. 5.7: Checkin screen showing different possible displays of fines owed

In this example, the reader has just returned a second overdue item during this session. He owed £4.60 from transactions prior to this checkin session (which may include fines for overdue, damaged and/or lost items). The first overdue item checked in during this session carried a charge of 60p. The second overdue item just checked in carries a charge of 40p.

The value in the *Previous charges:* field is the total of outstanding charges from transactions prior to this checkin session. In this example, this total is £4.60.

The value in the *This session:* field is the total of overdue charges accumulated on items checked in during this checkin session (i.e., without interruption, whether through staff exiting checkin, or through any item being checked in for any other reader). In this example, this total is £1: 60p from the earlier overdue item in this checkin session, and 40p from the current item.

The value in the *Amount:* field is the charge on the last item checked in (in this example 40p).

Note that none of the values in these fields will *necessarily* equate to the total amount currently owed by the current reader, which would display if one pressed **<Return>** as if to exit checkin:

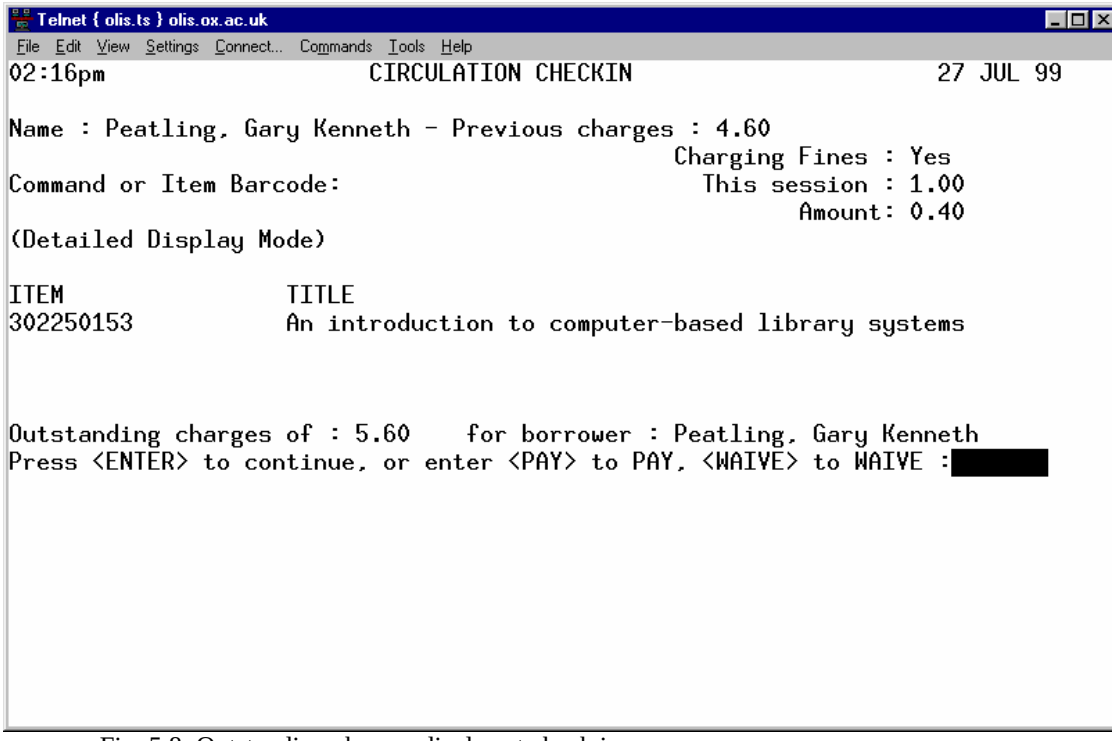
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
02:16pm CIRCULATION CHECKIN 27 JUL 99
Name : Peatling, Gary Kenneth - Previous charges : 4.60
Charging Fines : Yes
Command or Item Barcode: This session : 1.00
Amount: 0.40
(Detailed Display Mode)
ITEM TITLE
302250153 An introduction to computer-based library systems
Outstanding charges of : 5.60 for borrower : Peatling, Gary Kenneth
Press <ENTER> to continue, or enter <PAY> to PAY, <WAIVE> to WAIVE :

Fig. 5.8: Outstanding charges display at check in

(See below, 5.15-6, on dealing with this "Outstanding charges" prompt at check in.) In this example this total is £5.60: the sum of the £4.60 previous charges and the £1.00 charges for the current checkin session. Normally the fines totals at check in will not be quite this varied: but if such a screen is found confusing, it is possible to reset the *Amount:* field to blank after the checkin of each item by typing **r** and pressing **<Return>**. Note that this does *not* waive the charge, which will remain registered on OLIS. When the next item is checked in, any charge incurred on that item will again appear in this field, though **r** may again be entered to blank out this field.

Enter pay to register fine payment

Typing the command **pay** and pressing **<Return>** at the checkin item prompt will provide a quick option to register the payment of all or part of any outstanding fines owed by the last reader to check an item in. A screen similar to the following will then appear:

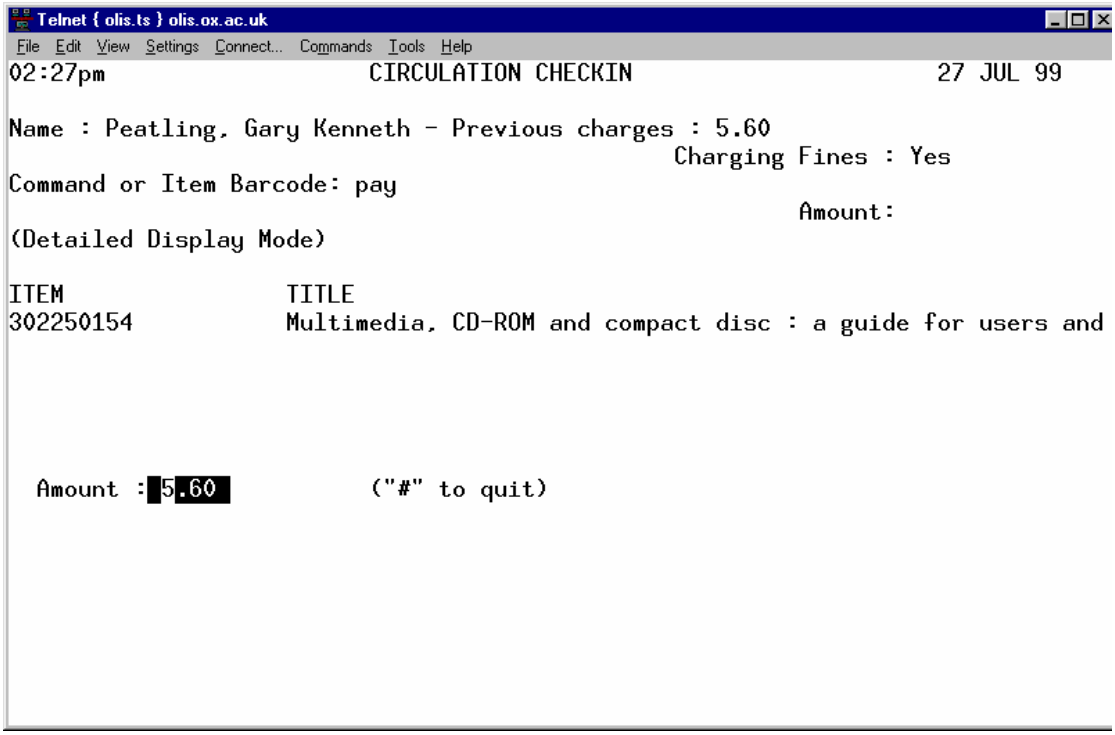
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
02:27pm CIRCULATION CHECKIN 27 JUL 99
Name : Peatling, Gary Kenneth - Previous charges : 5.60
Charging Fines : Yes
Command or Item Barcode: pay
Amount:
(Detailed Display Mode)
ITEM TITLE
302250154 Multimedia, CD-ROM and compact disc : a guide for users and
Amount : 5.60 ("#" to quit)

Fig.5.9: Fine payment at checkin

At this point it is possible to:

- Register full payment of all of the reader's outstanding fines by pressing **<Return>**.
- Leave the reader's total of outstanding fines unchanged by typing # and pressing **<Return>**.
- Register the partial payment of the reader's outstanding fines by typing in a figure (e.g., **.5** for 50p, **1** for £1, or **1.2** for £1.20) and pressing **<Return>**. Note that if part payment of multiple outstanding fines is registered at this point, it is *not* possible to specify which fines have been fully or partly paid; this must be done through the *Accounts Receivable* screen (see below, 6.14-6).

Enter waive to register the waiving of fines

Typing the command **waive** and pressing **<Return>** at the checkin item prompt will similarly provide a quick option to register the waiving in full or part of any outstanding fines owed by the last reader to check an item in. At this point it is again possible to:

- Register full waiving of all of the reader's outstanding fines by pressing **<Return>**.
- Leave the reader's total of outstanding fines unchanged by typing # and pressing **<Return>**.
- Register the partial waiving of the reader's outstanding fines by typing in a figure (e.g., **.5** for 50p, **1** for £1, or **1.2** for £1.20) and pressing **<Return>**. Note that if part waiving of multiple outstanding fines is registered at this point, it is *not* possible to specify which fines have been fully or partly waived; this must be done through the Accounts Receivable screen (see below 6.17-8).

Enter ap to accept payment from the borrower.

Type **ap** at the checkin item prompt and press **<Return>** to access the Accounts Receivable screen for a borrower, where it is possible to register the payment or waving of fines (see 6.10-8), as well as view the accounts history of the reader (see 6.21-4). If an item has just been checked in for a borrower, typing **ap** and pressing **<Return>** will take you directly to that reader's Accounts Receivable screen. If no items have previously been checked in during this checkin session, typing **ap** and pressing **<Return>** will display a prompt where you may enter a reader barcode or name to retrieve the reader whose Accounts Receivable screen you wish to access.

Enter f to change "Charging Fines" from Yes to No or from No to Yes

Type **f** at the checkin item prompt and press **<Return>** to change the Charging Fines field from Yes to No or from No to Yes. By default this field will show Yes, which means that OLIS will register and display any overdue charges incurred on each item that is checked in. Payment or waiving of these fines may be registered at checkin (see 6.5-10) or at a later date (see 6.10-21). When this field shows a No, the system will not display or record any overdue fines which would have been charged against the borrower on each item that is checked in. Most of the time you will probably wish Yes to display in this field, as any individual fines that a reader incurs, or the total of fines outstanding against a reader, can in any case be registered as waived at the discretion of staff as they are incurred. However it may be convenient to change the Charging Fines field to No, for instance, when a reader eventually returns a large number of items which they have been prevented from returning on time by exceptional circumstances.

Enter lpd to display the patron record of the last borrower to return an item during this checkin session

Typing **lpd** and pressing **<Return>** at the item prompt will display brief details of the last reader for whom an item was checked in during this checkin session. A screen similar to the following will appear:

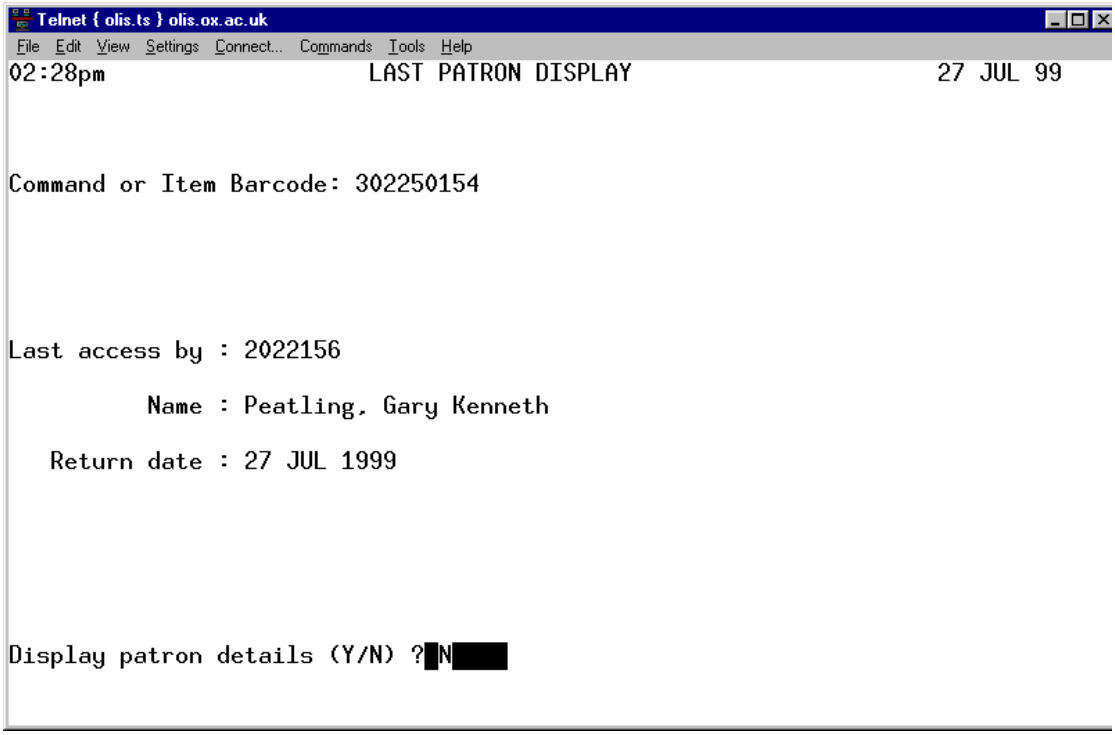
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
02:28pm LAST PATRON DISPLAY 27 JUL 99
Command or Item Barcode: 302250154
Last access by : 2022156
Name : Peatling, Gary Kenneth
Return date : 27 JUL 1999
Display patron details (Y/N) ? N

Fig. 5.10: Last Patron Display screen

At the prompt:

Display patron details (Y/N) ?

You may press **<Return>** to go back to the checkin screen. You may however type **y** press **<Return>** to display the reader's first Patron Registration screen:

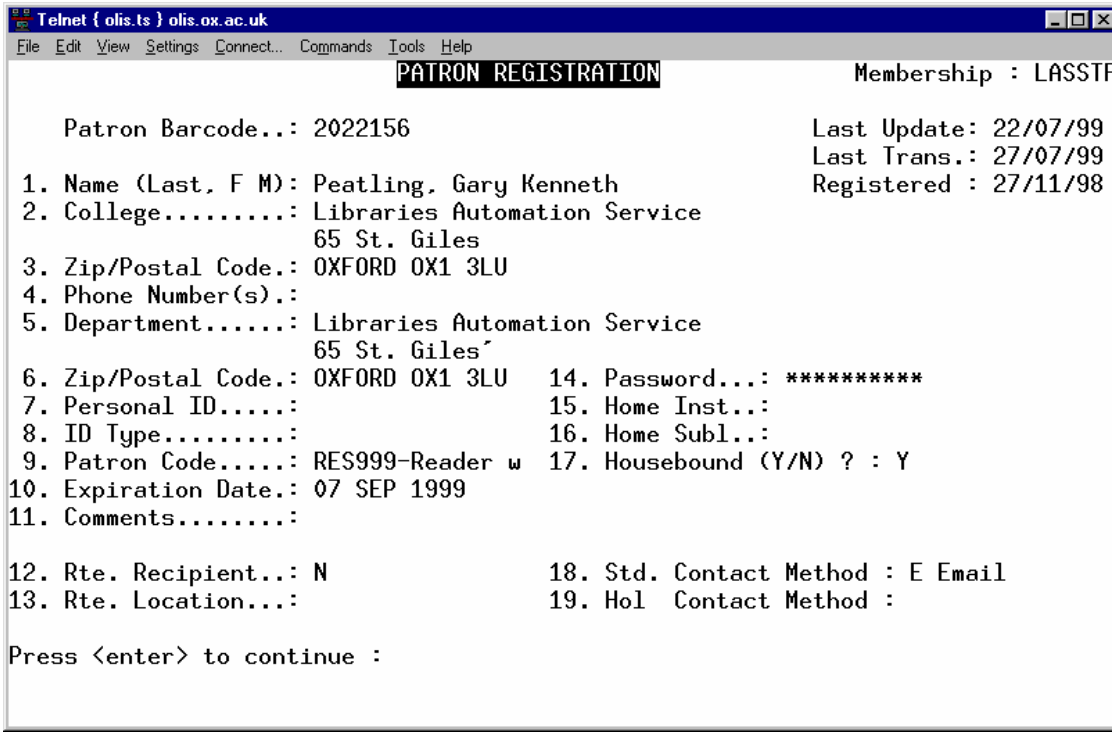
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
PATRON REGISTRATION Membership : LASSTF
Patron Barcode..: 2022156 Last Update: 22/07/99
Last Trans.: 27/07/99
1. Name (Last, F M): Peatling, Gary Kenneth Registered : 27/11/98
2. College.....: Libraries Automation Service
65 St. Giles
3. Zip/Postal Code.: OXFORD OX1 3LU
4. Phone Number(s).:
5. Department.....: Libraries Automation Service
65 St. Giles'
6. Zip/Postal Code.: OXFORD OX1 3LU 14. Password...: **********
7. Personal ID.....: 15. Home Inst..:
8. ID Type.....: 16. Home Subl..:
9. Patron Code.....: RES999-Reader w 17. Housebound (Y/N) ? : Y
10. Expiration Date.: 07 SEP 1999
11. Comments.....:
12. Rte. Recipient..: N 18. Std. Contact Method : E Email
13. Rte. Location...: 19. Hol Contact Method :
Press <enter> to continue :

Fig. 5.11: Patron Registration screen, accessed via the Last Patron Display screen

Please note that at this point this screen is for display only - the only option is to press **<Return>** to go back to the checkin screen. There is unfortunately no way of

accessing the item list or the checkout screen for the current reader direct from check in (this feature is currently under investigation).

Checkin Information Messages

Messages and instructions to staff at checkin will usually appear at the bottom left of the checkin screen. These messages will alert you to any exceptional circumstances concerning the item just checked in. Note that several of these messages may appear in succession in respect of the same checkin transaction.

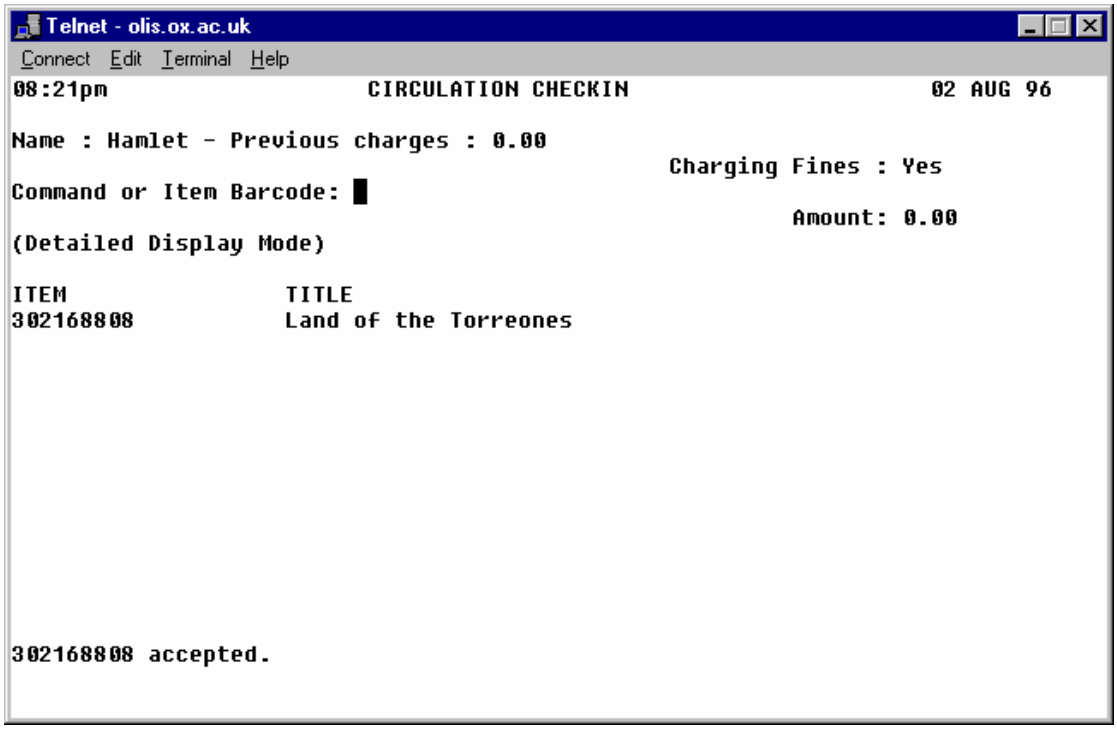

Fig. 5.12: Checkin screen with barcode accepted message (no fines)

3xxxxxx (Barcode) Accepted

OLIS will confirm that an item has been checked in by displaying the message

3xxxxxxxxx accepted

This message means that OLIS has recognised the barcode wanded (or typed) in and has registered the return of the item. Other exception/information messages (which are described in this section) may appear at checkin before this barcode accepted message displays. The return of the item will not be registered on OLIS until this barcode accepted message has appeared.

Patron Blocks

If a reader has certain blocks against their name, the checkin of any item registered as out on loan to them will be interrupted by the display of a blocks screen. This is most frequently the case if item(s) that they have reserved is/are awaiting their collection, and they thus have (an) Item Waiting for Collection Block(s) against their name:

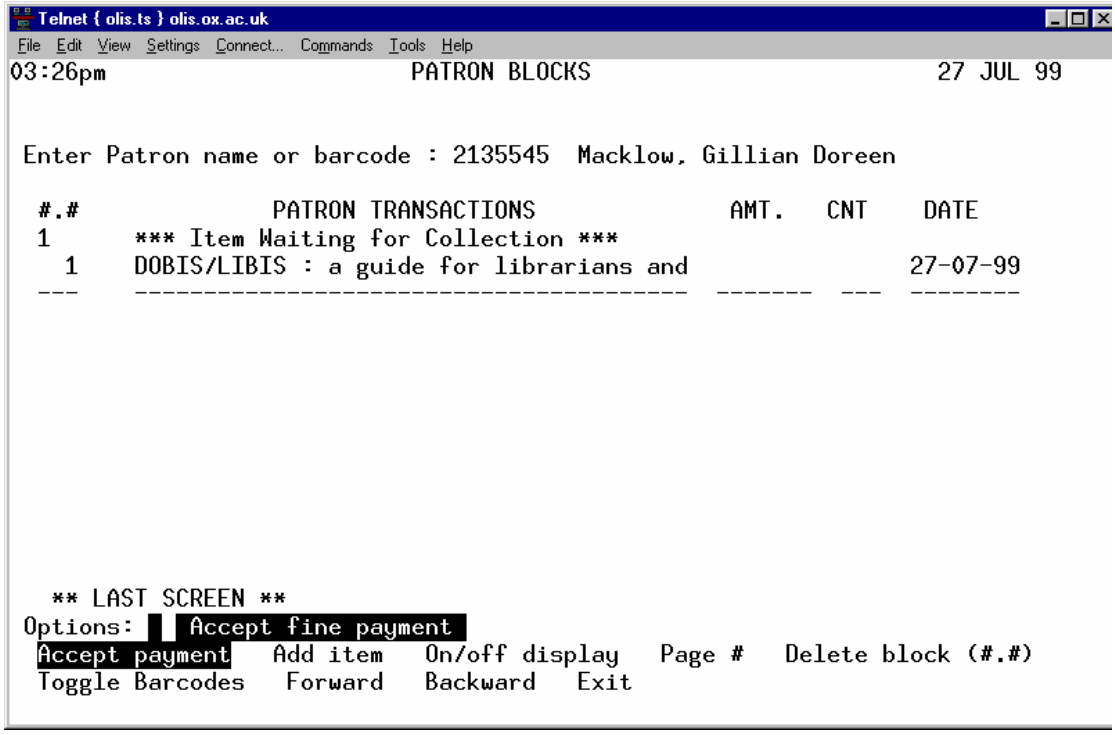
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
03:26pm PATRON BLOCKS 27 JUL 99
Enter Patron name or barcode : 2135545 Macklow, Gillian Doreen
#.# PATRON TRANSACTIONS AMT. CNT DATE
1 *** Item Waiting for Collection ***
1 DOBIS/LIBIS : a guide for librarians and 27-07-99
** LAST SCREEN **
Options: Accept fine payment
Accept payment Add item On/off display Page # Delete block (#.#)
Toggle Barcodes Forward Backward Exit

Fig. 5.13: Patron Blocks screen (Item Waiting for Collection Block)

It would be advisable to make a note of the item(s) displayed and/or the reader so that the item(s) can be retrieved from your hold shelf and checked out to the reader before they leave your circulation desk. First it is necessary to continue with registering the checkin of the current item, however; so select the option for **Exit** on the blocks screen and press **<Return>**.

Note that if you are checking in a series of items for a reader who has an item awaiting their collection, this block will continue to interrupt the checkin of each item until the item awaiting collection is checked out to the borrower or until the hold is cancelled (see 7.20-1, on cancelling filled holds). For this reason the display of this block may occasionally be found intrusive. A solution to this problem is being sought.

Outstanding charges

If there are charges due against a reader on (an) item(s) just checked in or on (a) previous transaction(s), these will display in a variety of areas of the checkin screen (see above 5.9-10). If any such charges are owed by a reader, the total will display whenever you press **<Return>** to exit checkin, or check in an item for a different borrower, in a message similar to the following:

```
Outstanding charges of : 1.80    for borrower : Peatling, Gary Kenneth
Press <ENTER> to continue, or enter <PAY> to PAY, <WAIVE> to WAIVE :
```

This will often be the easiest point at which to register fine payment (by typing **pay** and pressing **<Return>**) or the waiving of fines (by typing **waive** and pressing **<Return>**): see below 6.5-10. However, the payment and waiving of fines can also be registered at other times and at other points on OLIS (see below 6.10-21), so if you

wish to leave these charges to be dealt with at a later date, simply press **<Return>** to continue exiting checkin or checking in the next item.

Already Checked in

If an item that is not registered as checked out on OLIS is checked in, a message similar to the following will appear.

This Item 3xxxxxxxx is not checked out.

This would occur when an item's barcode has been inadvertently wanded in at checkin a second time. It can also occur when an item has missed the checkout process (through staff or system error) so that OLIS did not register the fact that the item was out on loan. As the item has now however been returned to the library, no further action is required - press **<Return>** when this message appears to continue.

Continue Prompt

The following Continue prompt appears in tandem with certain messages at check in:

Please enter "Y" to continue.

This prompt is intended to help draw the attention of staff to the associated message before continuing with the checkin transaction. Type **Y** and then press **<Return>** to continue when you have read the full displayed message.

Invalid Barcode or not in the system

When an item's barcode which is not recognised by OLIS is entered at check in, either of the following messages may appear.

The Item "x____x" has an invalid barcode. Please try again.

The Item "376895432" is NOT in the system. Please try again.

This might occur because of an error or omission in cataloguing, or because the barcode is damaged or has deteriorated to the point where it is illegible to the barcode reader, or because the barcode's number has been keyed in incorrectly. Re-enter the barcode (try typing it in if wanding has not worked, or vice versa). After a number of tries, if the system will not accept the barcode, it would be advisable to type **s** at the item prompt and to search OLIS to retrieve and check in the item (see above 5.6-7). It would then be advisable to give the item a new barcode.

Invalid Command

A message similar to the following will appear if you key in a few digits (as many as five) at the checkin item prompt which are not recognised by OLIS as one of the valid commands listed above (see 5.6-14):

The command "B" is NOT valid. Type "?" for HELP.

On Hold

A message in the following format will appear in the centre of the checkin screen when a checked in item satisfies a reservation placed by or for the named reader:

```
Hold for Patron:
     Name    : Peatling, Gary Kenneth
    Phone    : 278172
     Address : Libraries Automation Service
               65 St. Giles'
```

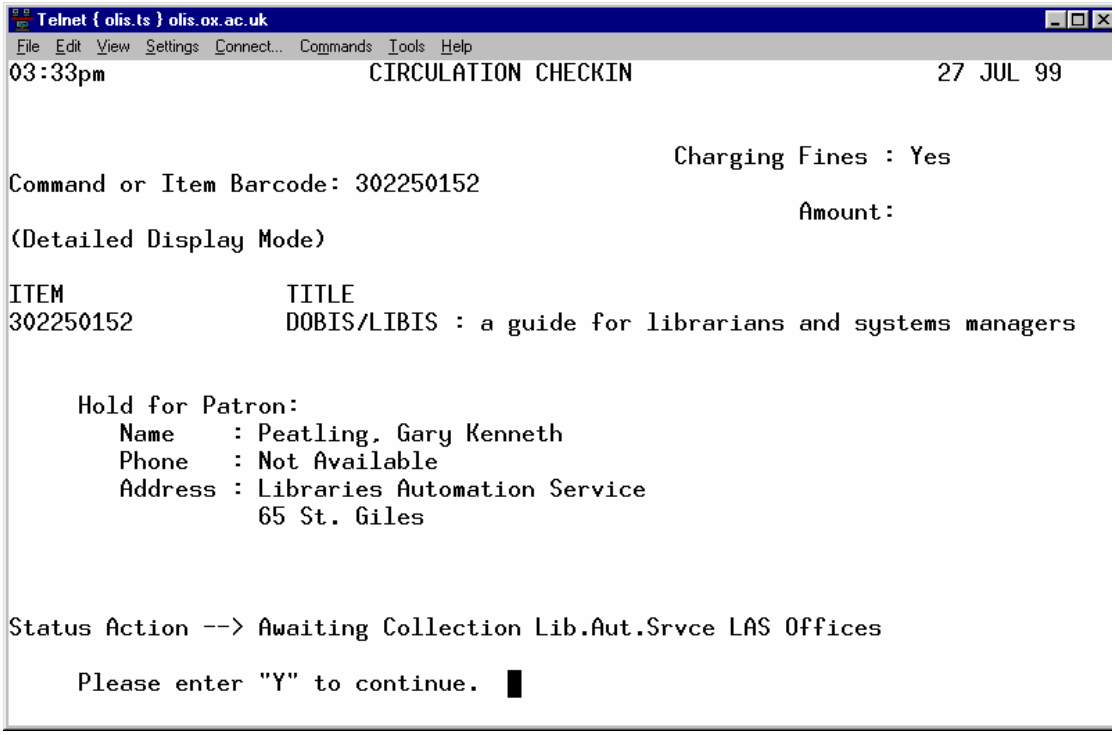
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
03:33pm CIRCULATION CHECKIN 27 JUL 99
Charging Fines : Yes
Command or Item Barcode: 302250152
Amount:
(Detailed Display Mode)
ITEM TITLE
302250152 DOBIS/LIBIS : a guide for librarians and systems managers
Hold for Patron:
Name : Peatling, Gary Kenneth
Phone : Not Available
Address : Libraries Automation Service
65 St. Giles
Status Action --> Awaiting Collection Lib.Aut.Srvce LAS Offices
Please enter "Y" to continue.

Fig. 5.14: Checkin screen : On hold message

If this message appears, depending on your library's setup (see Circulation Set Up Manual, 4.5), a notice for the reader for/by whom the reservation was placed should be generated the next time the notice production job is run (which will be the following morning). We advise you to make a note of the name of this borrower, and of the date when the hold was filled (so that it will be possible regularly to check if/when holds have lapsed), and to place the item on your reserves shelf. Then type **y** and press **<Return>** to continue.

On Hold Shelf

If an item is checked in which is registered on OLIS as on the hold shelf awaiting collection, the following message will appear:

```
This item 302250154 on hold shelf until 16 MAY 99 17:42
Enter Y to remove item from hold shelf, or N to leave
```

If this a mistake, type **n** and press **<Return>** and then replace the item on your hold shelf so that it may be collected by the reader for whom it is reserved.

This option may be useful however for cancelling a filled hold (i.e., removing a hold from the system if the reader decides that they do not want the item after it has been returned to the library), or for removing a lapsed hold (i.e., a held item not collected by the reader for/by whom they have been reserved) from the hold shelf. Typing **y** and pressing **<Return>** at this point will make such an item available for other readers (see 7.20-2 below for suggestions on how to deal with the subsequent prompts).

Recalled

The following message appears when an item which has been recalled is checked in.

```
This item was recalled by the library. Please enter "Y" to continue.
```

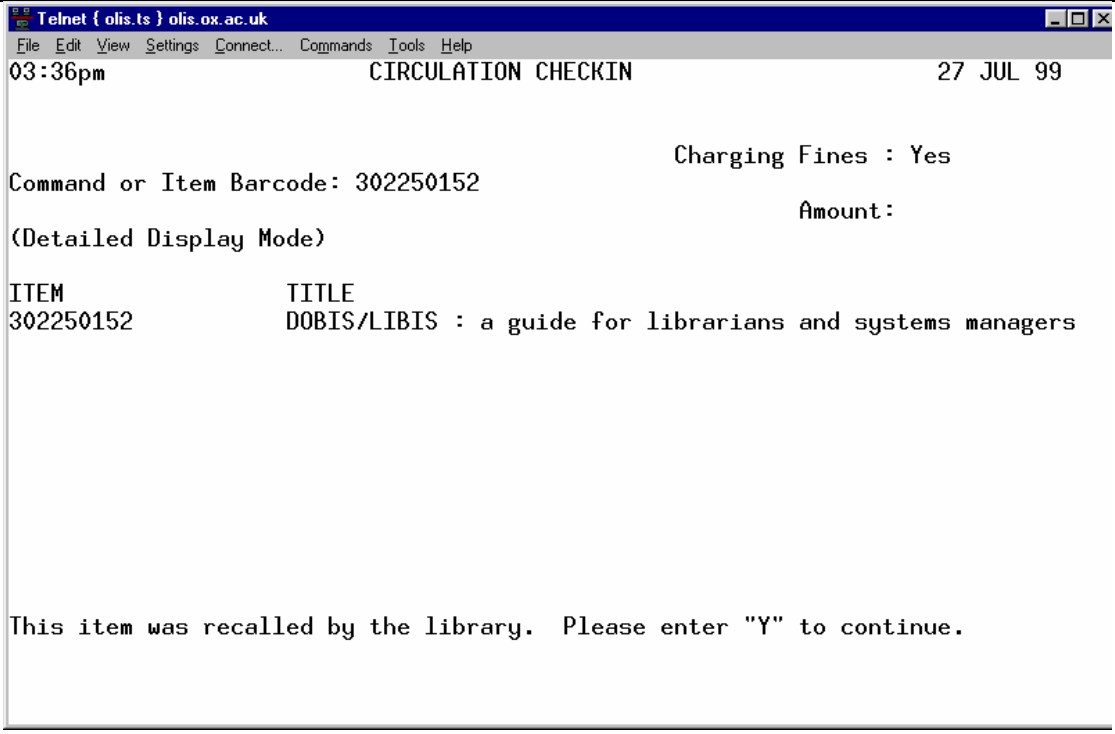
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
03:36pm CIRCULATION CHECKIN 27 JUL 99
Charging Fines : Yes
Command or Item Barcode: 302250152
Amount:
(Detailed Display Mode)
ITEM TITLE
302250152 DOBIS/LIBIS : a guide for librarians and systems managers
This item was recalled by the library. Please enter "Y" to continue.

Fig. 5.15: Checkin screen: Recall message

Type **y** and press **<Return>**. If the item has been reserved as well as recalled, a second message will display the name of the reader by/for whom the item has been reserved:

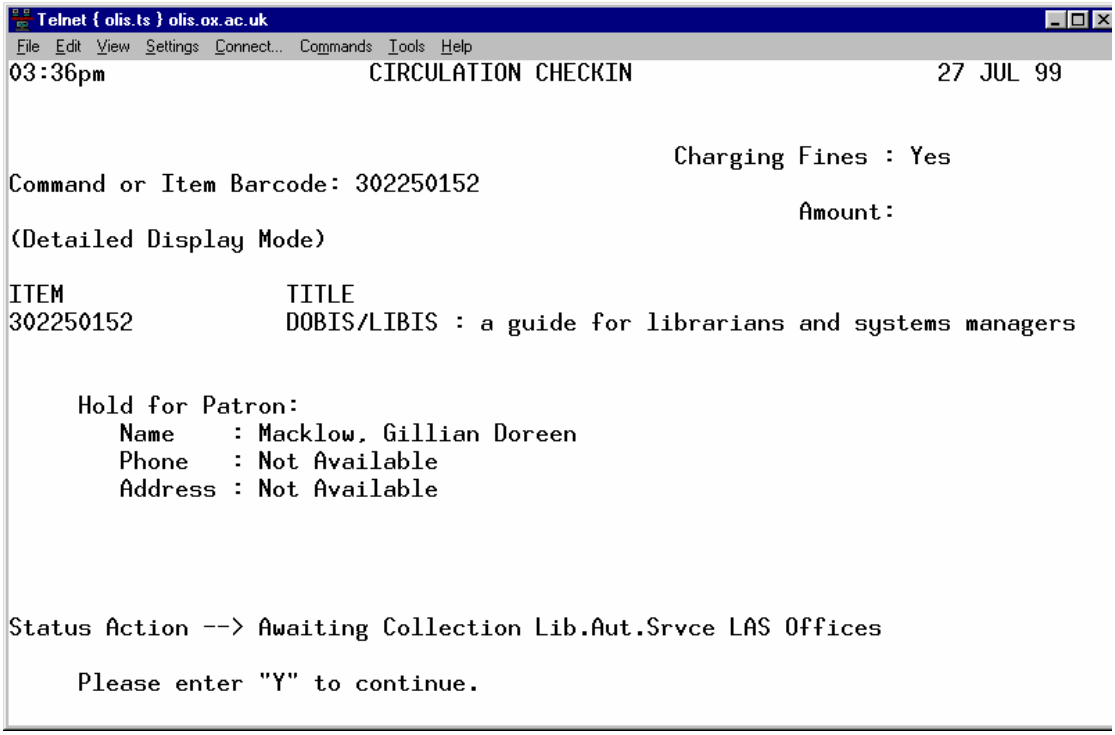
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
03:36pm CIRCULATION CHECKIN 27 JUL 99
Charging Fines : Yes
Command or Item Barcode: 302250152
Amount:
(Detailed Display Mode)
ITEM TITLE
302250152 DOBIS/LIBIS : a guide for librarians and systems managers
Hold for Patron:
Name : Macklow, Gillian Doreen
Phone : Not Available
Address : Not Available
Status Action --> Awaiting Collection Lib.Aut.Srvce LAS Offices
Please enter "Y" to continue.

Fig. 5.16: Checkin screen: On hold message

Make a note of this reader and the date on which the item has been returned (as is explained on 5.17 above). Then type **y** and press **<Return>** to continue with the checkin transaction.

Circulation Notes

Notes attached to a loan at check out or from the borrower's item list (see above 4.11-2) will display when the item's barcode is entered at check in.

Only three lines of a note are displayed at a time (the first line of the note will include the date and time that the note was entered, along with the title of the item), but there may be more of the note, in which case the following message will display:

More of this note - press <RETURN>

Press **<Return>** to display more of the note. When the end of the note is reached, the following message will appear:

End of note - press <RETURN>

Please observe that such a note will **not** be saved for subsequent display: any action suggested in the note (for instance repair of the item) should thus be carried out before the item is loaned again. Pressing **<Return>** will take you back to the checkin item prompt.

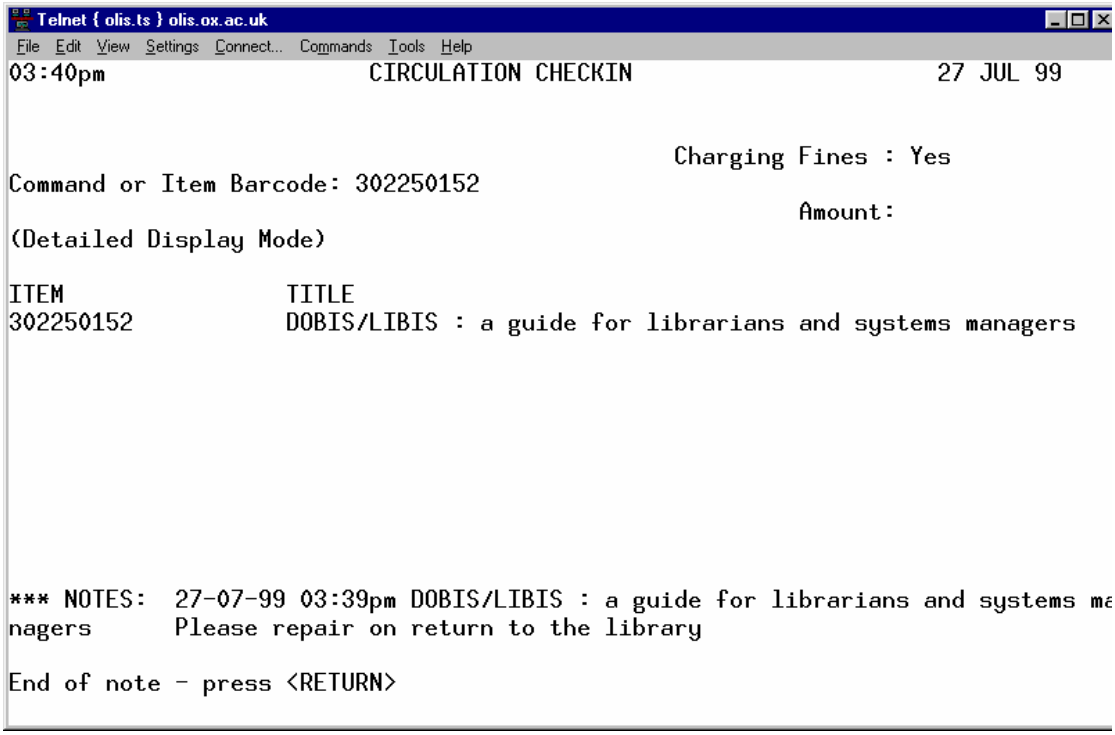
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
03:40pm CIRCULATION CHECKIN 27 JUL 99
Charging Fines : Yes
Command or Item Barcode: 302250152
Amount:
(Detailed Display Mode)
ITEM TITLE
302250152 DOBIS/LIBIS : a guide for librarians and systems managers
*** NOTES: 27-07-99 03:39pm DOBIS/LIBIS : a guide for librarians and systems ma
nagers Please repair on return to the library
End of note - press <RETURN>

Fig. 5.17: Checkin screen display of note attached at check out

Claimed Returned

If an item for which a claimed returned block has been placed against the name of the current borrower is checked in, the following message will appear:

Item was claimed returned by patron 2xxxxxx. Do you want to remove the block ? (Y/N)

Entering **n** and pressing **<Return>** will maintain the claimed returned block on this borrower's record.

Entering **y** and pressing **<Return>** will remove the claimed returned block from the borrower's record.

If the item is also overdue, any overdue fine will be applied as normal, and can therefore be waived at your discretion if desired.

Lost Item found

If an item which features in a lost item block is wanded in at check in, you will **not** be prompted automatically to remove the lost item block and any attached charge. These have to be removed from the reader's record separately. If the lost item is also overdue, any overdue charge will be calculated normally as the item is checked in, and can therefore be waived at your discretion if desired.

Incorrect Location

When an item barcode is entered at check in, OLIS will automatically check if it is being returned at the correct location. If the reader has returned the item to the wrong location by mistake, one of the following messages will display:

If the item incorrectly returned to your circulation desk is registered as on loan from another circulating library, a message similar to the following will display:

```
*** RETURNING ITEM AT INCORRECT LOCATION ***
Return to: Social Studies Faculty, Main Library
Please enter "Y" to continue.
```

If the reader is still at your circulation desk, point out the error to them and ask them to return the item to the correct library. If the reader is no longer at your circulation desk, it would be appreciated if you could have the item returned to the correct library. Type **y** and press **<Return>** to continue.

If the item incorrectly returned to your circulation desk is from a non-circulating library, a message similar to the following will display:

```
Item must be returned at Lady Marg. H.
```

If the reader is still at your circulation desk, point out the error to them and ask them to return the item to the correct library. If the reader is no longer at your circulation desk, it would be appreciated if you could have the item returned to the correct library. Type **y** and press **<Return>** to continue.

In more exceptional circumstances, an item from another circulating library registered on OLIS as *not* on loan may be erroneously returned to your library. In those circumstances, the following message will display:

```
Status Action --> ON ROUTE Social Stud.
   Please enter "Y" to continue.
```

In this rare case, the status of the item is changed by checking it in at your library, so that it is particularly important that the item is returned to the correct library. Please contact LAS if you are in any doubt. Type **y** and press **<Return>** to continue.

Incomplete, Return to Cataloguing

If an item is checked in having been checked out using the first conversion on-the-fly method (3.32-3), the following message will display:

```
Pending Action --> Incomplete, Return to cataloguing
   Please enter "Y" to continue.
```

It is possible to return the item to general circulation and to check it out on subsequent occasions without any further action. However, the item will not display on the OPAC until the brief record which has been created in the conversion on-the-fly

screen is upgraded to a full record by a cataloguer. You may therefore wish to set the item aside for further cataloguing before it is returned to general circulation.

Last patron display

You may for a variety of reasons wish to display the details of the last reader to borrow (*or renew* if the item is still in their possession) a particular item after you have left the checkin screen or checked in an item for a different reader (so that the lpd command - see above 5.12-4 - cannot be used). This information may be accessed using the CLPD command. Use the following guidelines:

[NB: You will need to have the correct barcode of the item to use this function. If you do not have the item with you, so are unable to wand in its item barcode, type **search** from any menu in the circulation module in order to display the staff OPAC search screen. You may then use any of the searching techniques described in the staff OPAC pocket reference guide leaflets or in the first two reader pocket reference guides (available in leaflet form or at http://www.lib.ox.ac.uk/olis/) in order to find the item display. Locate the copy in which you are interested, and the barcode may be displayed by selecting the **# line** option, typing in the line number of the copy, and pressing **<Return>**.]

Step 1

Type **clpd** from any menu in the circulation module and press **<Return>**.

Step 2

At the prompt:

Command or Item Barcode:

Wand in the barcode for which you wish to display last borrower details, or type in the barcode and press **<Return>**.

Step 3

A screen showing brief details of the last borrower of the item similar to the following will display:

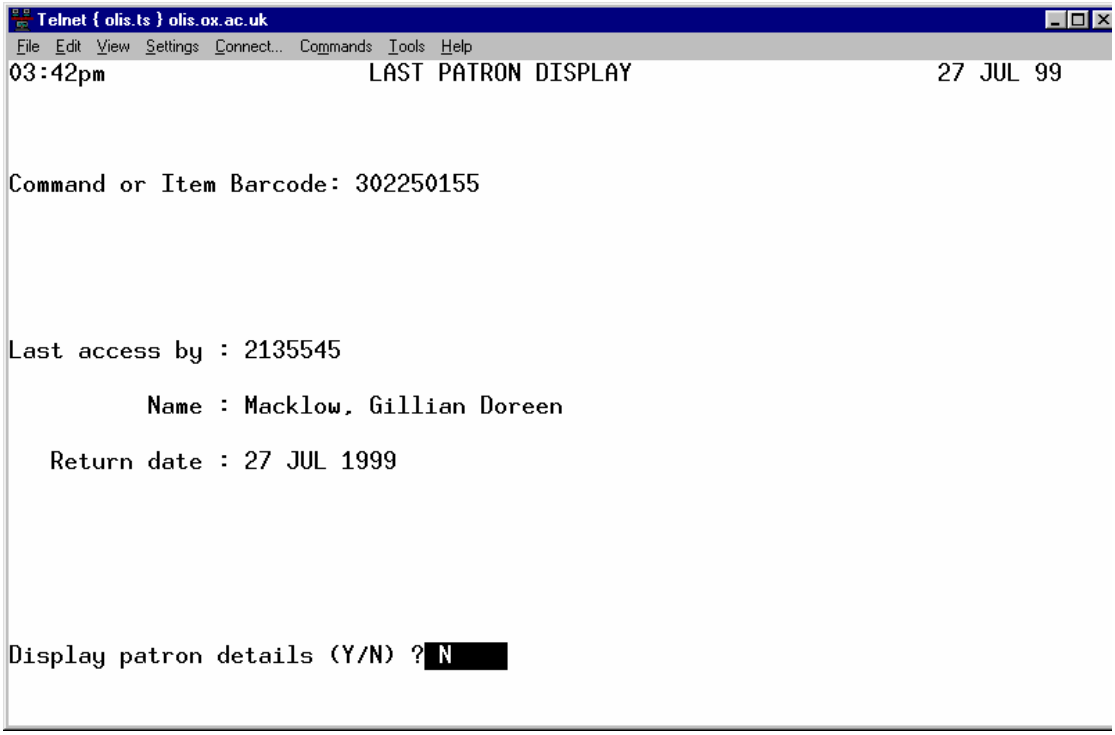
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
03:42pm LAST PATRON DISPLAY 27 JUL 99
Command or Item Barcode: 302250155
Last access by : 2135545
Name : Macklow, Gillian Doreen
Return date : 27 JUL 1999
Display patron details (Y/N) ? N

Fig. 5.18: Last patron display through CLPD

Press **<Return>** to go back to the checkin item prompt. As when using the lpd command at checkin, however, it is possible to display the reader's Patron Registration screen by typing **y** and pressing **<Return>** at this point. These details are also for display only: the only option available from this second screen is to press **<Return>** to go back to the checkin item prompt. Press **<Return>** once more to go back to a circulation menu.

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Fines

Introduction

This chapter provides guidelines on dealing with fines. The most common type of fine in OLIS circulation will be fines for overdue items, but this chapter will also explain how replacement charges for lost items, and charges levied for damage to items, may be dealt with on OLIS.

Directions for registering the payment or waiving of fines, either partially or fully, are included. The usual method will be to register the payment and/or waiving of fines direct from the checkin screen as overdue items are returned. However, if more detail is desired, or if a reader is unable to pay their fines on the spot, a full *Accounts Receivable* screen is also available, where it is possible to enter more precise details of which fines have been paid/waived and which have not. Through this screen it is also possible to access a full record of a reader's past fines in your library.

Creation and display of charges

Charges for items returned after they are due are the most common type of fine in Oxford libraries. If an item is returned to your library after the due date, fines will be calculated on the basis of any fine rule in field 12 of the link in the matrix between the relevant patron membership and circulation code (see Circulation Set Up Manual, 8.9-12, 22). If there is no fine rule in this field at this or at the generic circulation code level, no overdue fine will be calculated. This field should therefore be edited if you wish to change the fine rates incurred in your library. [**NB**: Grace periods entered in fields 5 and 6 of the appropriate parts of the matrix will also influence the fine rates charged in your library (see Circulation Set Up Manual, 8.20-1).]

Overdue fine payment (or waiving) can be registered from the point of the overdue item being checked in, but not before. The paying or waiving of lost or damaged item charges can be registered once the appropriate block has been added to a reader's record (see 6a.9-11).

When an overdue item is checked in, the checkin screen will appear similar to the following:

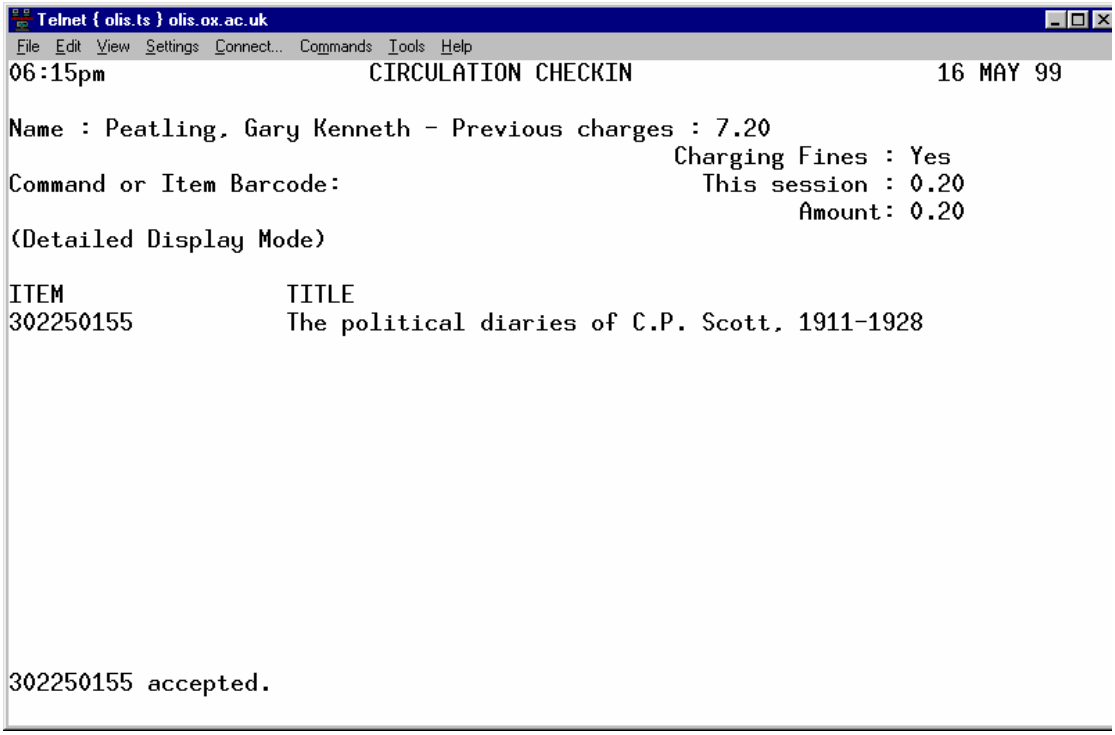

Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
06:15pm CIRCULATION CHECKIN 16 MAY 99
Name : Peatling, Gary Kenneth - Previous charges : 7.20
Charging Fines : Yes
Command or Item Barcode:
This session : 0.20
Amount: 0.20
(Detailed Display Mode)
ITEM TITLE
302250155 The political diaries of C.P. Scott, 1911-1928
302250155 accepted.

Fig. 6.1: Fines payable at Checkin: first screen

As explained above (5.9-10) different totals may display on this screen, as they represent the charges from different (combinations of) transactions:

- The value in the *Previous charges:* field is the total of all outstanding charges incurred prior to this checkin session. This may include charges for damaged or lost items.

- The value in the *This session:* field is the total of overdue charges accumulated on items checked in during this checkin session (i.e., without interruption whether

through staff exiting check in, or through any item being checked in for any other reader).

- The value in the *Amount:* field is the overdue charge on the last item checked in.

If these different totals are found confusing, it is possible to type the command **r** and press **<Return>** at the checkin item prompt to blank out the amount field after each item is checked in (if any overdue charges are incurred on the next item to be checked in, these will again be displayed in this field) (see above 5.10). It is also possible to type the command **f** and press **<Return>** at the checkin item prompt to turn off the charging of overdue fines during the checkin session, which may be found useful in rare circumstances (see above 5.12).

When amounts outstanding are displayed on the checkin screen in these fields, it is possible to continue checking in further items. None of the values in these fields will *necessarily* equate to the total amount currently owed by the current reader (including any lost or damaged item charges), which can be displayed and paid (or waived) at any point during the checkin session using the **pay** (or **waive**) commands (see below 6.5-10). In addition, if there are outstanding charges against the reader when one presses **<Return>** as if to exit check in, *or* when one checks in an item for a different reader, a message similar to the following will display the total amount owed by the reader:

```
Outstanding charges of : 7.40    for borrower : Peatling, Gary Kenneth
Press <ENTER> to continue, or enter <PAY> to PAY, <WAIVE> to WAIVE :
```

NB: Confusion may arise if a reader is returning items on behalf of more than one person (e.g., on behalf of themselves and a friend). A display of fines outstanding for one reader will interrupt check in if the barcode of an item which has been on loan to a different reader is wanded in - even if those items have been physically brought to your circulation desk by the same person. The underlying logic is that a new reader has "appeared" at check in and checked in an item. Bear in mind therefore that the person returning books at your circulation desk may *not necessarily* be the reader displayed on your checkin screen as owing outstanding fines.

There are three methods for registering the payment and waiving of fines -

1) directly at check in using the *fastpay* or *fastwaive* procedures (see below).

2) at any stage by using the *AP* procedure through the Accounts Receivable screen, where more options are available (including viewing the account history of the borrower) (see 6.10-9, 21-4).

3) Using the fastpay/fastwaive procedure through the patron registration (CPR) screen (this option is rarely used).

In most cases the fastpay/fastwaive method direct at check in will be used, especially where the reader is able to pay overdue fines at the moment they are incurred.

Fastpay

Fast total payment of fine

If a reader has accumulated fines on items that are currently being checked in (or on past transactions), and is able and willing to pay the total amount off on the spot, please use the following guidelines.

Step 1

When you have checked in all the items which the reader is returning, type **pay** at the checkin item prompt and press **<Return>**.

Alternatively, you may press **<Return>** as if to exit check in. As you press **<Return>**, *or check in an item which has been on loan to a different reader*, a screen similar to the following will appear:

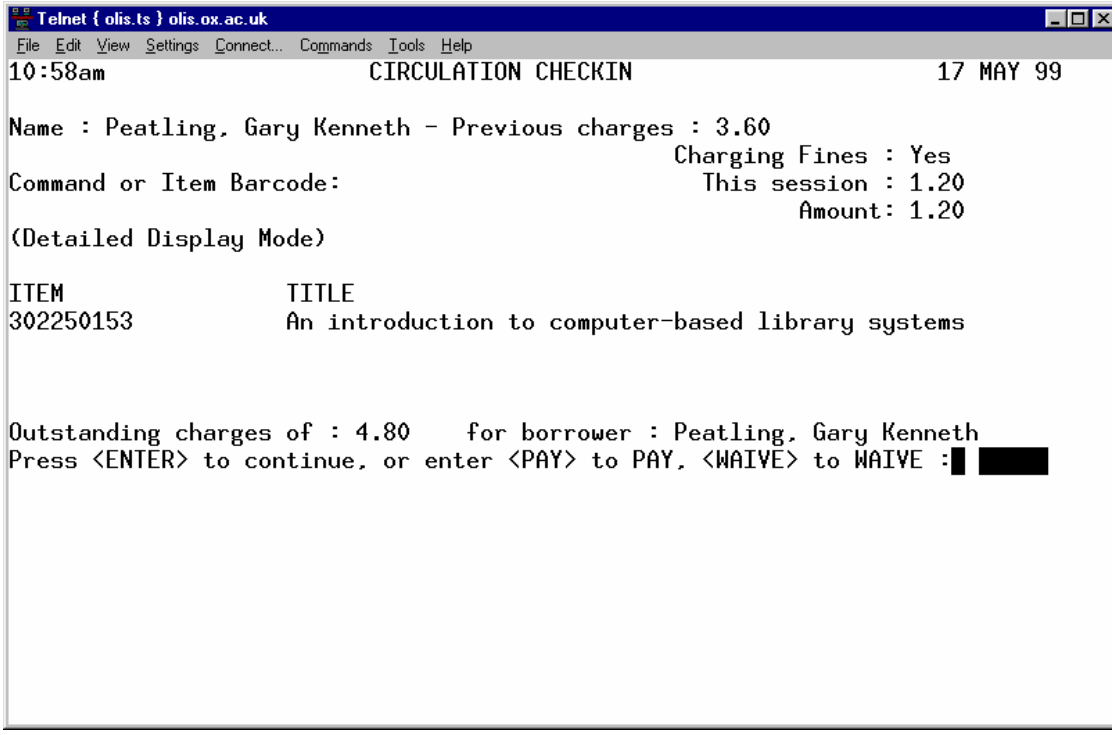

Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
10:58am CIRCULATION CHECKIN 17 MAY 99
Name : Peatling, Gary Kenneth - Previous charges : 3.60
Charging Fines : Yes
Command or Item Barcode:
This session : 1.20
Amount: 1.20
(Detailed Display Mode)
ITEM TITLE
302250153 An introduction to computer-based library systems
Outstanding charges of : 4.80 for borrower : Peatling, Gary Kenneth
Press <ENTER> to continue, or enter <PAY> to PAY, <WAIVE> to WAIVE :

Fig. 6.2: Fastpay and fastwaive options

Type **pay** at this point and press **<Return>**.

Step 2

A prompt similar to the following showing the total amount owed by the reader will appear:

Amount : 4.80 ("#" to quit)

[NB: If at this point you wish to abort the transaction, type # and press **<Return>**. The charge will still be outstanding against the reader's record.]

Step 3

The cursor will appear in the amount field. To register the payment of the full amount, just press **<Return>**. The following prompt will appear:

```
Payment confirmed - all outstanding charges cleared . Press <ENTER> :
```

Step 4

Press **<Return>** and you will be taken back to a circulation menu, or may proceed with registering the check in of the item you previously wanded in.

Fast partial payment of fine

If a reader has accumulated fines on items they are currently checking in (or on past transactions), and is able and willing to pay only part of the amount off on the spot, please use the following guidelines.

[NB: Please note that if a reader has fines outstanding from several transactions, registering part payment of the amount owed through fastpay in this way does *not* enable you to specify which fine(s) are paid. This procedure will instead clear fines (or as much of them as the amount paid covers) in the order in which they were incurred. If you wish to keep a record for any reason of which specific fines a reader has paid, it will be necessary to use the *Accounts Receivable* screen to register the partial payment of outstanding charges (see below 6.14-6).]

Step 1

When you have checked in all the items which the reader is returning, type **pay** at the checkin item prompt and press **<Return>**.

Alternatively, you may press **<Return>** as if to exit check in. As you press **<Return>**, *or check in an item which has been on loan to a different reader*, a screen similar to the following will appear:

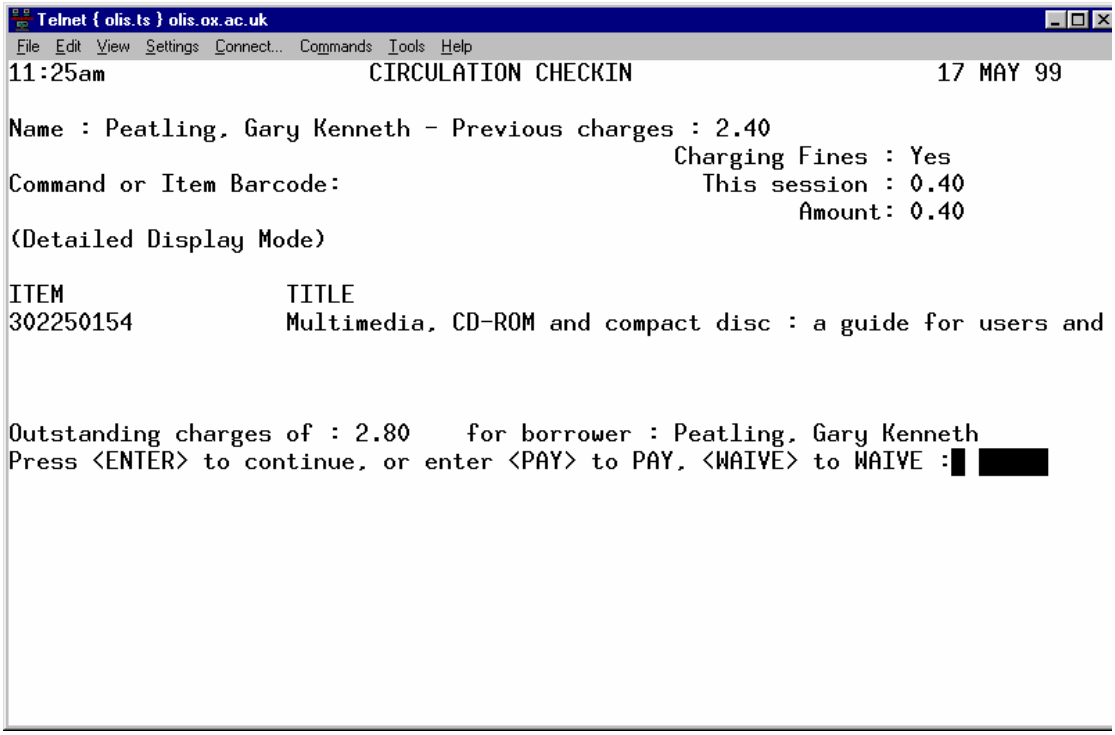

Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
11:25am CIRCULATION CHECKIN 17 MAY 99
Name : Peatling, Gary Kenneth - Previous charges : 2.40
Charging Fines : Yes
Command or Item Barcode: This session : 0.40
Amount: 0.40
(Detailed Display Mode)
ITEM TITLE
302250154 Multimedia, CD-ROM and compact disc : a guide for users and
Outstanding charges of : 2.80 for borrower : Peatling, Gary Kenneth
Press <ENTER> to continue, or enter <PAY> to PAY, <WAIVE> to WAIVE :

Fig. 6.3: Fastpay and fastwaive options

Type **pay** at this point and press **<Return>**.

Step 2

A prompt showing the total amount owing similar to the following will appear:

Amount : 2.80 ("#" to quit)

[NB: If at this point you wish to abort the transaction, type # and press **<Return>**. The full charges will still be outstanding against the reader's record.]

Step 3

The cursor will appear in the amount field. To register the payment of part of the fine owed, type in the actual amount paid (e.g. **2** for £2, **2.4** for £2.40, **.8** for 80p) over the full amount owed, and then press **<Return>**.

Step 4

The following prompt will appear:

Payment confirmed . Press <ENTER> :

Step 5

Press **<Return>** and you will be taken back to a circulation menu, or may proceed with registering the check in of the item you previously wanded in.

Waiving fines

Fast full waive

If a reader has accumulated fines on items they are currently checking in (or on past transactions), and you wish to waive the full amount on the spot, please use the following guidelines:

Step 1

When you have checked in all the items which the reader is returning, type **waive** at the checkin item prompt.

Alternatively, you may press **<Return>** as if to exit check in. As you press **<Return>**, *or check in an item which has been on loan to a different reader*, a screen similar to the following will appear:

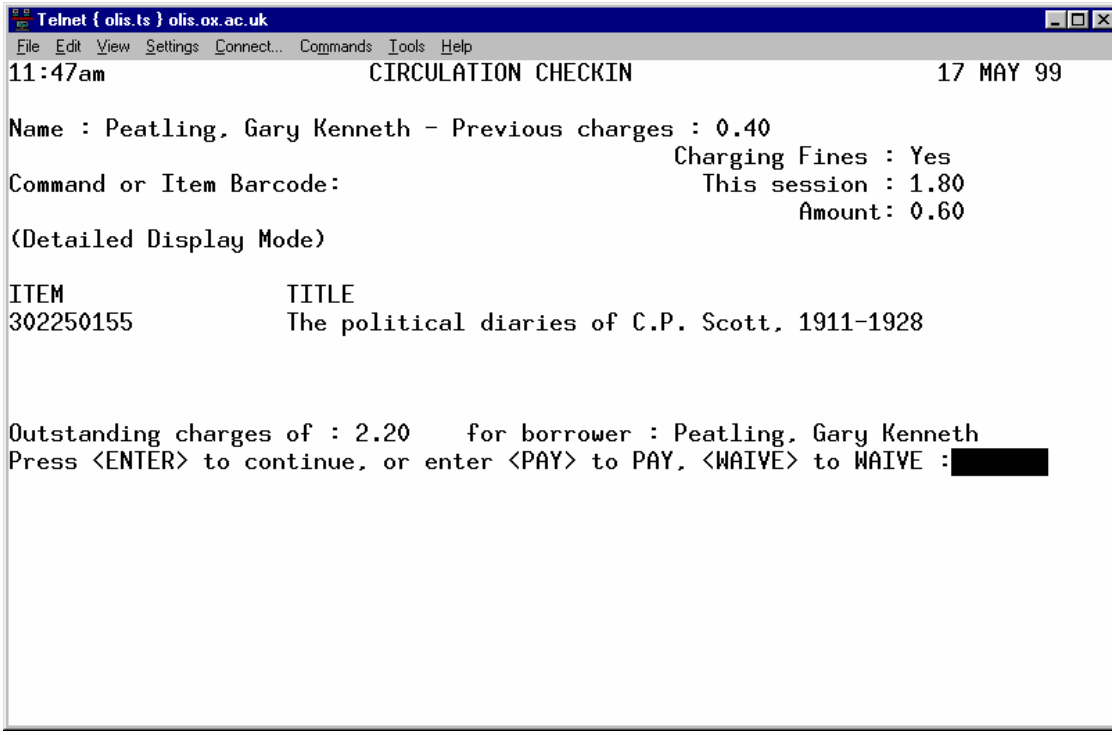

Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
11:47am CIRCULATION CHECKIN 17 MAY 99
Name : Peatling, Gary Kenneth - Previous charges : 0.40
Charging Fines : Yes
Command or Item Barcode: This session : 1.80
Amount: 0.60
(Detailed Display Mode)
ITEM TITLE
302250155 The political diaries of C.P. Scott, 1911-1928
Outstanding charges of : 2.20 for borrower : Peatling, Gary Kenneth
Press <ENTER> to continue, or enter <PAY> to PAY, <WAIVE> to WAIVE :

Fig. 6.5: Fastpay and fastwaive options

Type **waive** at this point and press **<Return>**.

Step 2

A prompt showing the total amount owing similar to the following will appear:

Amount : 2.20 ("#" to quit)

[NB: If at this point you wish to abort the transaction, type # and press **<Return>**. The charge will still be outstanding against the reader's record.]

Step 3

The cursor will appear in the amount field. To waive the full amount, just press **<Return>**. The following prompt will appear:

```
Payment confirmed - all outstanding charges cleared . Press <ENTER> :
```

[NB: This message reads "Payment confirmed" rather than "Waive confirmed" because OLIS consistently treats waiving as a payment method. The fact that such fines have been waived rather than paid will however be recorded on OLIS.]

Step 4

Press **<Return>** and you will be taken back to a circulation menu, or may proceed with registering the check in of the item you previously wanded in.

Fast partial waive

If a reader has accumulated fines on items they are currently checking in (or on past transactions), and you wish to waive part of the amount owed on the spot, please use the guidelines below:

[NB: Please note that if a reader has fines outstanding from several transactions, waiving part of the amount owed through fastwaive does *not* enable you to specify which fine(s) have been waived. This procedure will instead clear fines (or as much of them as the amount waived covers) in the order in which they were incurred. If you wish to keep a record for any reason of which specific fines have been waived, it will be necessary to use the *Accounts Receivable* screen to register the partial waiving of outstanding charges (see below 6.17-8).]

Step 1

When you have checked in all the items which the reader is returning, type **waive** at the checkin item prompt.

Alternatively, you may press **<Return>** as if to exit check in. As you press **<Return>**, *or check in an item which has been on loan to a different reader*, a screen similar to the following will appear:

```
Outstanding charges of : 1.60    for borrower : Peatling, Gary Kenneth
Press <ENTER> to continue, or enter <PAY> to PAY, <WAIVE> to WAIVE :
```

Type **waive** at this point and press **<Return>**.

Step 2

A prompt similar to the following will appear:

```
Amount : 1.60          ("#" to quit)
```

[NB: If at this point you wish to abort the transaction, type # and press **<Return>**. The full charges will still be outstanding against the reader's record.]

Step 3

The cursor will appear in the amount field. Type in the amount of the fine you wish to waive (e.g., **1** for £1, **.8** for 80p) over the full amount owed, and then press **<Return>**.

Step 4

The following prompt appears:

```
Payment confirmed . Press <ENTER> :
```

[NB: This message reads "Payment confirmed" rather than "Waive confirmed" because OLIS consistently treats waiving as a payment method. The fact that such fines have been waived (fully or partially) rather than paid will however be recorded on OLIS.]

Step 5

Press **<Return>** and you will be taken back to a circulation menu, or may proceed with registering the check in of the item you previously wanded in..

Deferring payment at Check in

When a reader has accumulated fines on items they are currently checking in (or items that they have returned late, lost or damaged in the past), the fastpay prompt, i.e.:

```
Outstanding charges of : 5.00    for borrower : Peatling, Gary Kenneth
Press <ENTER> to continue, or enter <PAY> to PAY, <WAIVE> to WAIVE :
```

will appear. If the reader is unable and/or unwilling to pay off any part of their fines on the spot, and you do not wish to waive any of these charges, just press **<Return>** at this prompt. As when fines are only partially paid or waived at this point, any outstanding charges (including any outstanding lost or damaged item charges) will remain linked to the borrower's record, and can be retrieved later so that payment or waiving may be registered using any of the following methods:

- through the AP procedure in the reader's *Accounts Receivable* screen (see below).
- through fastpay via the reader's *Patron Registration* screen (CPR - see 6.19-21).
- when checking in items which have been loaned to the reader in future, deferred fines will appear as 'previous charges', and you will be able to register payment or waiving of this amount through checkin along with any further incurred charges. This procedure is identical to that described above (6.5-10)

AP (Accounts payable) procedure

It is best to use the AP procedure when you need to register the partial or full payment or waiving of particular fines in more detail. The reader's account history (i.e., a list of the charges that they have incurred in your library in the past and which have been

paid or waived, as well as outstanding charges) can also be displayed through this option (see below, 6.21-4).

The AP screen can be accessed through check out, through check in, or through the patron blocks screen.

1) AP procedure from Check out

If you are not already at check out, select the option for or type **cout** and press **<Return>** from any menu screen in the circulation module. Wand in the borrower barcode (or otherwise retrieve the borrower record: see above 2.3-6 on other ways to retrieve a borrower record). At the item prompt type **ap** and press **<Return>**.

*NB If there are no outstanding charges for the reader, the following prompt will appear at this point:
No outstanding charges - see account details (Y/N) ?
Typing **y** and pressing **<Return>** will display the reader's account history (see below, 6.21-4).
Just pressing **<Return>** or typing **n** and pressing **<Return>** will take you back to the checkin item prompt.

If outstanding fines are linked to the reader's record, a screen similar to the following will appear:

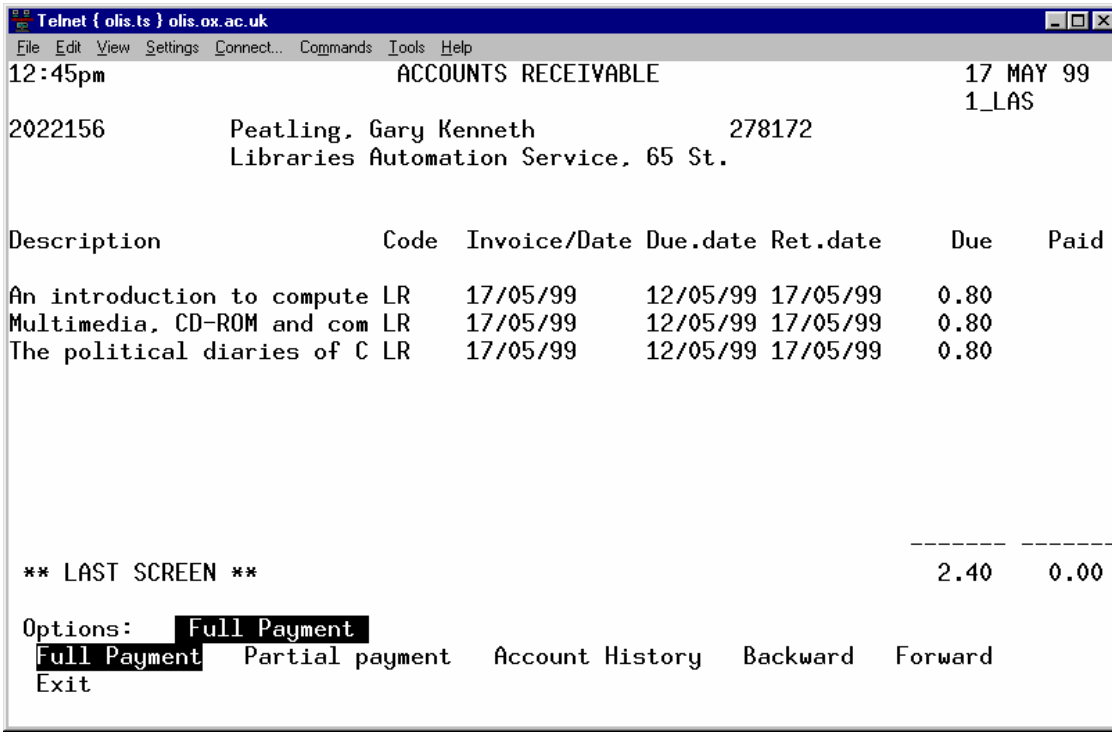

Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
12:45pm ACCOUNTS RECEIVABLE 17 MAY 99
1_LAS
2022156 Peatling, Gary Kenneth 278172
Libraries Automation Service, 65 St.
Description Code Invoice/Date Due.date Ret.date Due Paid
An introduction to compute LR 17/05/99 12/05/99 17/05/99 0.80
Multimedia, CD-ROM and com LR 17/05/99 12/05/99 17/05/99 0.80
The political diaries of C LR 17/05/99 12/05/99 17/05/99 0.80
** LAST SCREEN ** 2.40 0.00
Options: Full Payment
Full Payment Partial payment Account History Backward Forward
Exit

Fig. 6.6: Accounts Receivable screen

The title of each item on which a fine was incurred displays in a *Description* column on the left of this screen. The type of fine incurred on each item will display in the *Code* column; this will usually be LR (for late returns), but LOST B (for a replacement charge for a lost item) and DM (for a charge applied for damage to an

item) may also appear, and each kind of fine may be paid through this screen. For each overdue fine, the date in the column *Due.date* indicates when the item was due - the date in the column *Ret.date* is when the item was actually returned or renewed. (Please ignore the column *Invoice/Date*).

Options are available for **Full payment** or **Partial payment**. These enable you to register payment by cash or cheque, or to register the waiving, of all or part of a reader's outstanding charges.

Full payment from AP - cash payment

Step 1

In this AP screen, the cursor will default to the **Full payment** option, so just press **<Return>**. The following prompt will appear:

```
Enter amount of payment :
```

Step 2

Type in the amount which the reader wishes to pay (e.g., **5** for £5.00, **2.4** for £2.40, **.7** for 70p) and press **<Return>**. A screen similar to the following will appear:

```
Telnet { olis.ts } olis.ox.ac.uk
File  Edit  View  Settings  Connect...  Commands  Tools  Help
12:45pm                        ACCOUNTS RECEIVABLE                    17 MAY 99
                                                                      1_LAS
2022156          Peatling, Gary Kenneth              278172
                 Libraries Automation Service, 65 St.


Description                Code  Invoice/Date Due.date Ret.date     Due    Paid

                          PAYMENT METHODS

               1) CASH
               2) CHEQUE
               3) FASTPAY
               4) FASTWAY
               5) TCHEQUE
               6) WAIVE




Enter payment methods or (E)xit :
     Use a , to separate each different payment type.
```

Fig. 6.7: Payment Methods screen

Step 3

Choose the relevant payment method from this list by typing its line number (e.g., **1** for cash) and press **<Return>**. The most common payment method at this point will

be cash (option 1) - please see below 6.13-4 on using the payment method cheque (option 2). A prompt similar to the following will appear:

```
Payment Due : 2.40          Balance Due:    0.00
Enter amount tendered (CASH) :
```

Step 4

If you have selected the payment method cash, enter the actual amount paid again (e.g., **5** for a five pound note) and press **<Return>**.

Step 5

A prompt similar to the following will appear (showing the amount of change to be given in cash if appropriate):

```
Change : 2.60          Balance Due:    0.00
Do you wish to process this transaction? (Y/N) :
```

Type **y** and press **<Return>** to register payment.
Type **n** and press **<Return>** to stop the payment procedure and leave the fine(s) unpaid.

A blank *Accounts Receivable* screen should appear (i.e., containing no outstanding fines). Select the option for **Exit** and press **<Return>** to go back to the checkout item prompt. If you wish to go back to a circulation menu, press **<Return>** twice more.

Full payment from AP - cheque payment

If you select option 2 (cheque) from the list of payment methods, the procedure will be identical to that for cash, except that at the prompt:

```
Enter amount tendered (CASH) :
```

OLIS will query any amount entered greater than that owed. Once you have entered an amount here, the following prompt will appear:

```
Enter payment comment (CHEQUE) :
```

Please just press **<Return>** at this prompt, as although it is possible to enter a comment, it cannot later be retrieved. The prompt:

```
Do you wish to process this transaction? (Y/N) :
```

will appear. Again type **y** and press **<Return>** to register payment, or type **n** and press **<Return>** to stop the payment procedure and leave the fine(s) unpaid.

A blank *Accounts Receivable* screen will appear (i.e., containing no outstanding fines). Select the option for **Exit** and press **<Return>** to go back to the checkout item prompt. If you wish to go back to a circulation menu, press **<Return>** twice more.

Partial payment from AP - cash payment

Step 1

From the reader's AP screen, select the option for **Partial payment** and press **<Return>**. The list of available payment methods will appear.

Step 2

Choose the relevant payment method from this list by typing its line number (e.g., **1** for cash) and press **<Return>**. The most common payment method at this point will be cash (option 1) - please see 6.16-7 below on using the payment method cheque (option 2). A screen similar to the following will then appear:

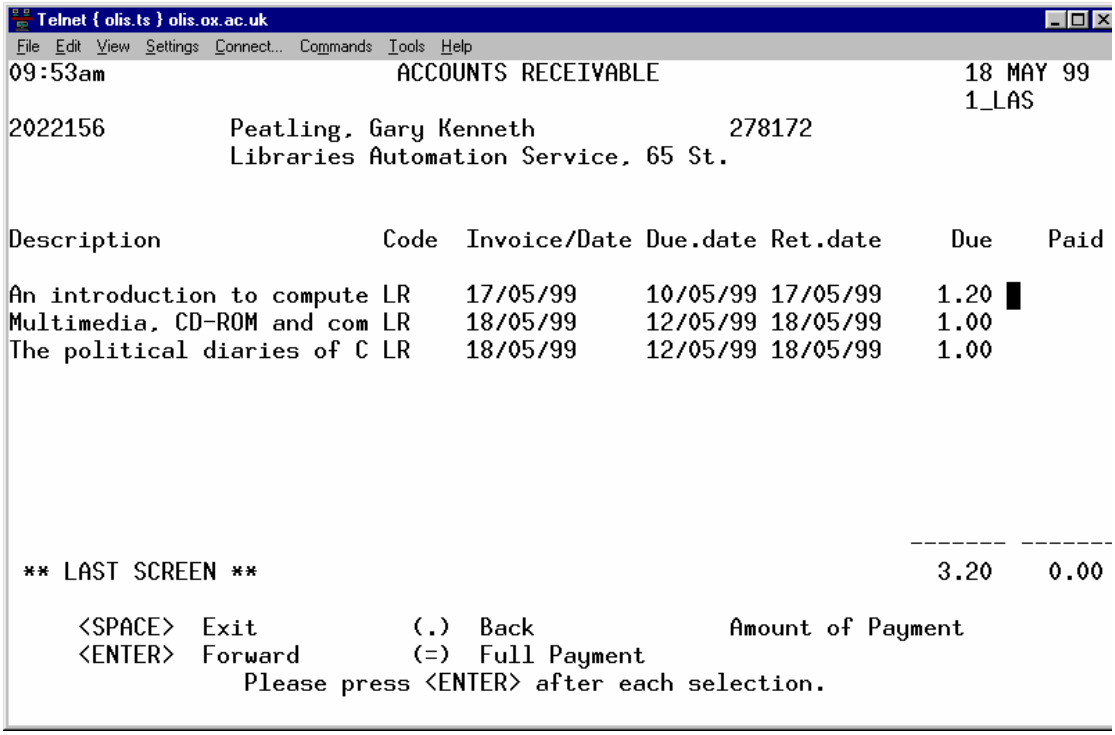

Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
09:53am ACCOUNTS RECEIVABLE 18 MAY 99
1_LAS
2022156 Peatling, Gary Kenneth 278172
Libraries Automation Service, 65 St.
Description Code Invoice/Date Due.date Ret.date Due Paid
An introduction to compute LR 17/05/99 10/05/99 17/05/99 1.20
Multimedia, CD-ROM and com LR 18/05/99 12/05/99 18/05/99 1.00
The political diaries of C LR 18/05/99 12/05/99 18/05/99 1.00
** LAST SCREEN ** 3.20 0.00
<SPACE> Exit (.) Back Amount of Payment
<ENTER> Forward (=) Full Payment
Please press <ENTER> after each selection.

Fig. 6.8: Accounts Receivable: partial payment screen

The cursor will appear in the *Paid* column to the right of the first fine. It is here that you may enter the quantity of each fine that you wish to register as paid by the reader: enter a figure (e.g., **.5** for 50p, **1** for £1, **1.2** for £1.20) to represent the sum paid. Leave the *Paid* field blank for any fine for which the reader has made no payment.

ÐNB The following commands are available at this point - most are listed at the bottom of this screen:

<SPACE>	Exit	Press **<Space>** and then **<Return>** when you have finished entering the amount of each fine paid: this will take you back to the option bar.
<ENTER>	Forward	Just press **<Return>** to move the cursor down to the paid column in the next line. When you are on the last line of fines, pressing **<Return>** will move the cursor back up to the *Paid* column on the first line.
<.>	Back	Typing a period **<.>** and pressing **<Return>** will move the cursor to the *Paid* column on the previous line.
<=>	Full Payment	Entering an equal sign <=> and pressing **<Return>** will indicate to OLIS that a particular fine has been paid in full: the cursor will move down to the next line.
<#>	Clear	Entering a hash sign **<#>** and pressing **<Return>** clears the field, and thus may be useful if you need to correct a mistake: the cursor will move down to the next line.

Step 3

When you have finished entering any amount paid in the *Paid* column against each item, press **<Space>** and then **<Return>** to exit the *Paid* column. A screen similar to the following will appear:

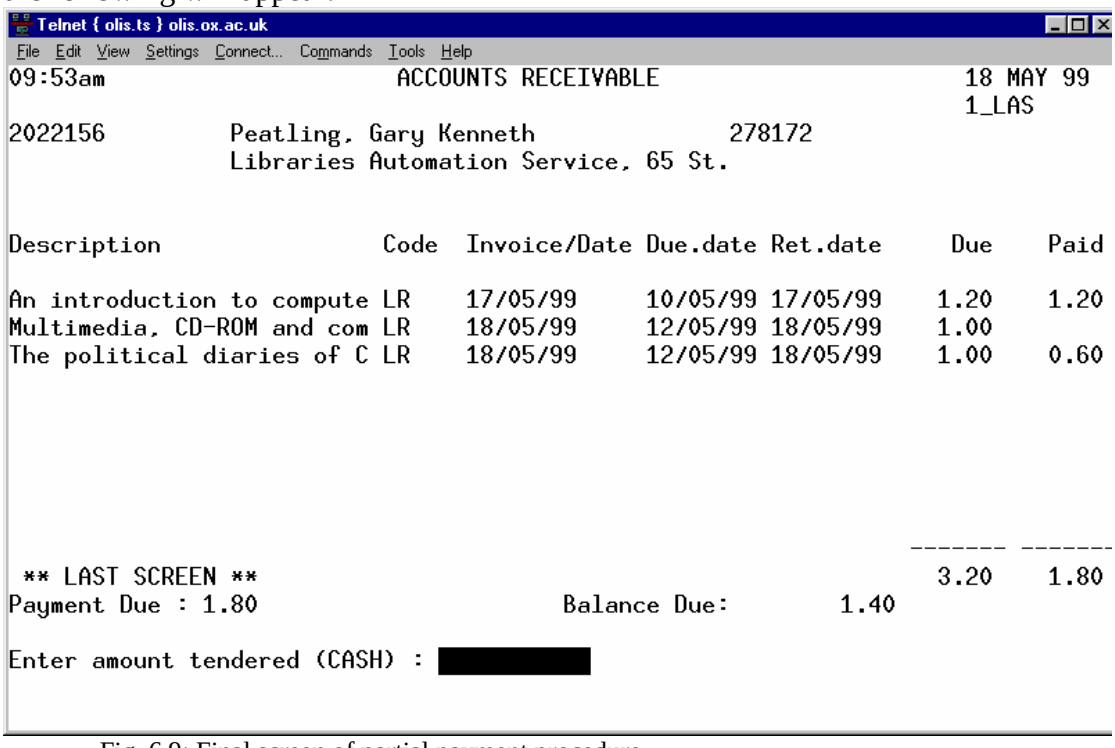

Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
09:53am ACCOUNTS RECEIVABLE 18 MAY 99
1_LAS
2022156 Peatling, Gary Kenneth 278172
Libraries Automation Service, 65 St.
Description Code Invoice/Date Due.date Ret.date Due Paid
An introduction to compute LR 17/05/99 10/05/99 17/05/99 1.20 1.20
Multimedia, CD-ROM and com LR 18/05/99 12/05/99 18/05/99 1.00
The political diaries of C LR 18/05/99 12/05/99 18/05/99 1.00 0.60
** LAST SCREEN ** 3.20 1.80
Payment Due : 1.80 Balance Due: 1.40
Enter amount tendered (CASH) :

Fig. 6.9: Final screen of partial payment procedure.

Step 4

The following prompt will appear:

```
Payment Due : 1.80          Balance Due:    1.40
Enter amount tendered (CASH) :
```

Enter the actual amount paid (e.g., **5** for five pounds) and press **<Return>**. The amount you enter here can be greater than the fine payment which you wish to register the reader as having made at this time, since OLIS will calculate and display the change which should be given to the borrower.

Step 5

The following prompt appears:

Do you wish to process this transaction? (Y/N) :

Type **y** and press **<Return>** to register payment.
Type **n** and press **<Return>** to stop the payment procedure and leave all fines unpaid.

The AP screen will now display any outstanding fines, the (new) total owing appearing at the foot of the *Due* column. Select the option for **Exit** and press **<Return>** to go back to the checkout item prompt. If you wish to go back to a circulation menu, press **<Return>** twice more.

Partial payment from AP - cheque payment

If you select option 2 (cheque) from the list of payment methods, the procedure will be identical to that for cash, except that at the prompt:

Enter amount tendered (CASH) :

OLIS will query any amount entered greater than the sum of the amounts that you have indicated will be paid on each line in the *Paid* column. Once you have entered an amount here, the following prompt will appear:

Enter payment comment (CHEQUE) :

Please just press **<Return>** at this prompt, as although it is possible to enter a comment, it cannot later be retrieved. The prompt:

Do you wish to process this transaction? (Y/N) :

will appear. Type **y** and press **<Return>** to register payment, or type **n** and press **<Return>** to stop the payment procedure and leave all fines unpaid.

The AP screen will now display any outstanding fines, the (new) total owing appearing at the foot of the *Due* column. Select the option for **Exit** and press **<Return>** to go back to the checkout item prompt. If you wish to go back to a circulation menu, press **<Return>** twice more.

Full waive from AP

If you wish to waive fines in full using AP, the procedure is very similar to that for full payment. Do not be confused by the fact that OLIS treats waiving as a method of payment - fines that are waived *will* be stored on OLIS as waived rather than paid.

Step 1

Select the **Full Payment** option from the *Accounts Receivable* screen.

Step 2

At the prompt:

```
Enter amount of payment :
```

Enter the total amount of the fines that you wish to waive (e.g., **5** for £5.00, **2.4** for £2.40, **.7** for 70p) and press **<Return>**.

Step 3

At the list of "Payment" methods, we recommend that you select option 4 for *Fastwav*. Type **4** and press **<Return>**.

Step 4

The following prompt will appear.

```
Do you wish to process this transaction? (Y/N) :
```

Type **y** and press **<Return>** to register waiving.
Type **n** and press **<Return>** to stop the waiving procedure and leave all fines unwaived.

A blank AP screen should appear (i.e., containing no outstanding fines). Select the option for **Exit** and press **<Return>** to go back to the checkout item prompt. If you wish to go back to a circulation menu, press **<Return>** twice more.

Partial waive from AP

If you wish to waive part of a reader's outstanding fines using AP, the procedure is very similar to that for registering the partial payment of fines. Do not be confused by the fact that OLIS treats waiving as a method of payment - fines that are waived *will* be stored on OLIS as waived rather than paid.

Step 1

Select the **Partial Payment** option from the AP screen.

Step 2

At the list of "Payment" methods, we recommend that you select option 4 *Fastwav*. Type **4** and press **<Return>**.

Step 3

The cursor will appear in the due column for the first of the reader's outstanding fines. Go through the fines, entering any amount in each case that you wish to waive. **NB**: The commands which can be used at this point are listed on 6.15 above. Once you have finished entering the amounts waived, press **<Space>** and then **<Return>**.

Step 4

The following prompt will appear:

Do you wish to process this transaction? (Y/N) :

Type **y** and press **<Return>** to waive the amount(s) you have entered, or type **n** and press **<Return>** to stop the waiving procedure and leave all fines unwaived.

The AP screen will now display any outstanding fines, the (new) total owing appearing at the foot of the due column. Select the option for **Exit** and press **<Return>** to go back to the checkout item prompt. If you wish to go back to a circulation menu, press **<Return>** twice more.

2) AP procedure from Check in

ÐNB Although it is possible to access from checkin, we recommend that the AP procedure is accessed from the checkout screen (see page 6.11)

Step 1

From the Checkin screen, type **ap** at the *command or item barcode* prompt and press **<Return>**.

Step 2

If you have just checked in an item for a reader, this will directly bring up their *Accounts Receivable* screen. Otherwise the following prompt will appear:

Enter patron name or barcode : To open/close the cash register type : OPEN or CLOSE

Wand in the borrower barcode, or otherwise retrieve their borrower record (see, above 2.3-6 on other ways of retrieving borrower records). The *Accounts Receivable* screen will appear.

Step 3

Follow the procedures outlined on 6.10-8 above for full and partial payment or waiving of fines. When you have finished, select the option **Exit** and press **<Return>** to go back to the checkin item prompt. Press **<Return>** once more if you wish to go back to a circulation menu.

3) AP procedure from the patron blocks screen

From the blocks screen of any reader, it is possible to access their *Accounts Receivable* screen by selecting the **Accept payment** option and pressing **<Return>**. Follow the procedures outlined on 6.10-8 above for full and partial payment or waiving of fines. When you have finished, select the option **Exit** and press **<Return>** to go back to the reader's blocks screen. If you have registered the full payment or waiving of fines, you should find that at least one block has been removed from the reader's blocks screen. See below ch.6a for more information on blocks.

This procedure is perhaps the easiest way to handle a charge against a reader for a lost or damaged item that they are willing to pay on the spot. A Lost Books or Damaged Book block can be added to the reader's record through their blocks screen (see above, 6a.9-11), and the payment of the charge can be registered via the Accept Payment option on the same screen. [NB: If the reader has no other blocks against their name, it will be necessary to exit and re-enter their blocks screen once you have added a Lost Books or Damaged Book block in order to make this Accept Payment option available.]

Fine payment or waiving through CPR

If you retrieve the *Patron Registration* screen (by any of the methods described on 2.3-6 above) of a reader who has outstanding fines in your library, a screen similar to the following will appear:

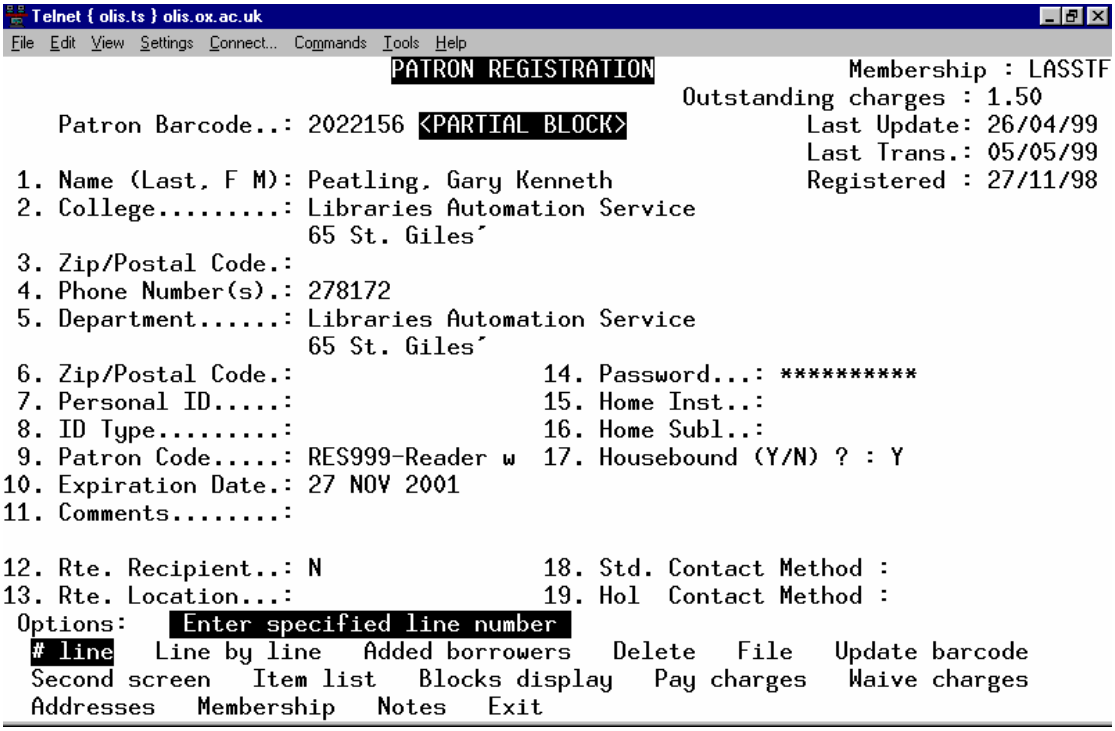

Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
PATRON REGISTRATION
Membership : LASSTF
Outstanding charges : 1.50
Patron Barcode..: 2022156 <PARTIAL BLOCK>
Last Update: 26/04/99
Last Trans.: 05/05/99
1. Name (Last, F M): Peatling, Gary Kenneth
Registered : 27/11/98
2. College.....: Libraries Automation Service
65 St. Giles'
3. Zip/Postal Code.:
4. Phone Number(s).: 278172
5. Department.....: Libraries Automation Service
65 St. Giles'
6. Zip/Postal Code.:
14. Password...: **********
7. Personal ID.....:
15. Home Inst..:
8. ID Type.....:
16. Home Subl..:
9. Patron Code.....: RES999-Reader w
17. Housebound (Y/N) ? : Y
10. Expiration Date.: 27 NOV 2001
11. Comments.....:
12. Rte. Recipient..: N
18. Std. Contact Method :
13. Rte. Location...:
19. Hol Contact Method :
Options: Enter specified line number
line Line by line Added borrowers Delete File Update barcode
Second screen Item list Blocks display Pay charges Waive charges
Addresses Membership Notes Exit

Fig. 6.10: Patron registration screen with Pay/Waive charges options available

The payment or waiving of fines can be registered in this screen respectively by selecting the **Pay charges** or **Waive charges** option and pressing **<Return>**. The procedure is similar to the Fastpay or Fastwaive procedures which can be used direct at checkin. If you select **Pay charges** and press **<Return>**, a screen similar to the following will appear:

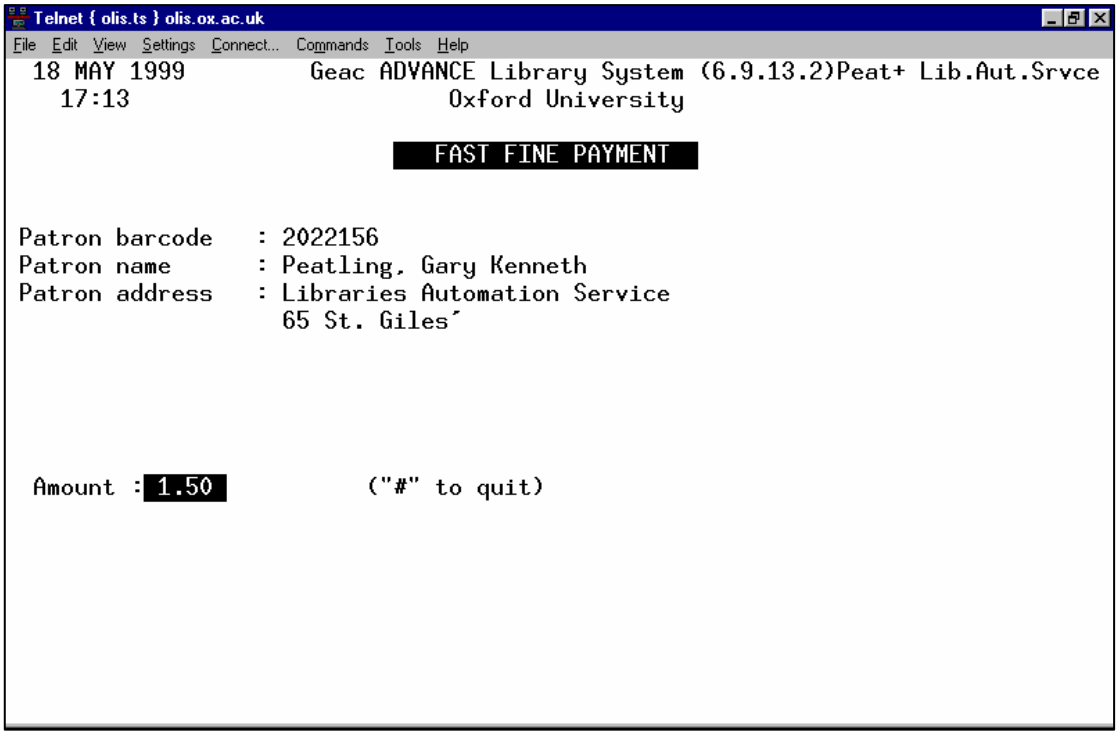

Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
18 MAY 1999
17:13
Geac ADVANCE Library System (6.9.13.2)Peat+ Lib.Aut.Srvce
Oxford University
FAST FINE PAYMENT
Patron barcode : 2022156
Patron name : Peatling, Gary Kenneth
Patron address : Libraries Automation Service
65 St. Giles'
Amount : 1.50
("#" to quit)

Fig. 6.11 : Fast fine payment screen through CPR

At this prompt you may:

- Press **<Return>** to register full payment of the outstanding charges.
- Type in an amount paid (e.g., **.5** for 50p, **1** for £1, **1.4** for £1.40) and press **<Return>** to register partial payment of the outstanding charges.
- Type # and press **<Return>** to abort the process.

Similar options can be used with the **Waive charges** option.

Viewing the Account History

A reader's Account History screen will display a list of the charges that they have incurred on OLIS in your library in the past and which have been paid or waived, as well as outstanding charges. **NB**: This facility is for display only - fine payment or waiving must be registered in the first AP screen.

Use the following guidelines to access a reader's Account History details.

Step 1

If you are not already at checkout, select the option for or type **cout** and press **<Return>** from any menu in the circulation module. At the checkout borrower prompt, wand in the reader's barcode or otherwise retrieve their borrower record (see 3.5 above on other ways of retrieving the borrower record at checkout). The checkout screen will appear:

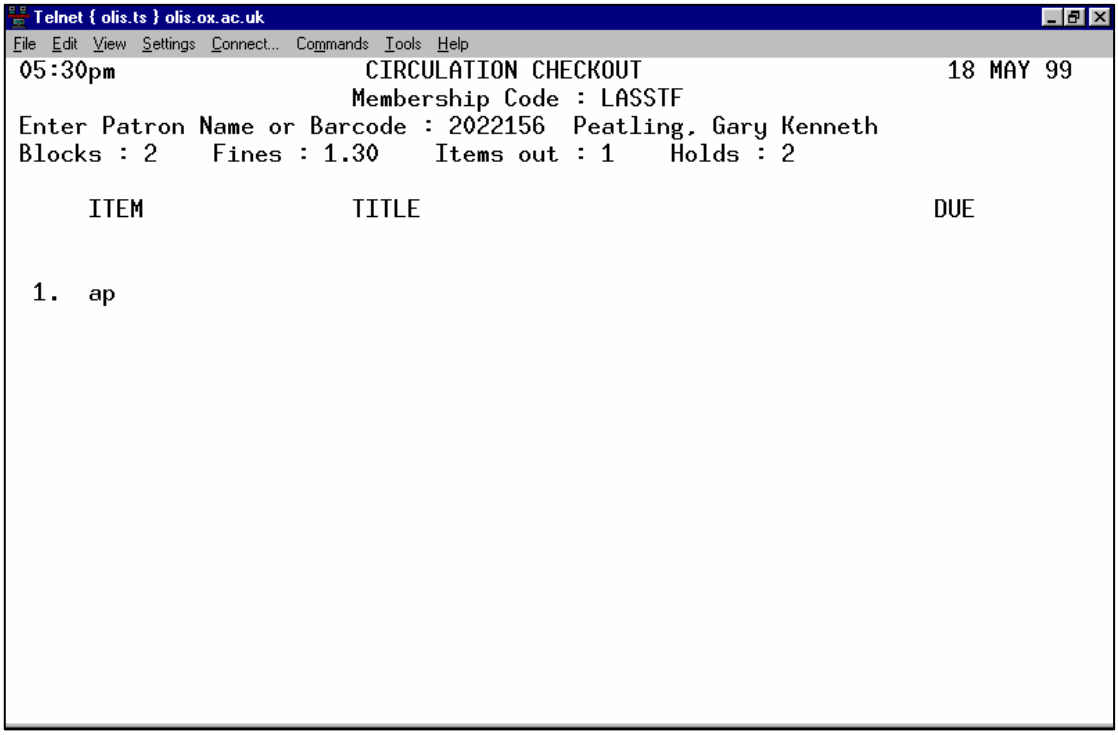

Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
05:30pm CIRCULATION CHECKOUT 18 MAY 99
Membership Code : LASSTF
Enter Patron Name or Barcode : 2022156 Peatling, Gary Kenneth
Blocks : 2 Fines : 1.30 Items out : 1 Holds : 2
ITEM TITLE DUE
1. ap

Fig. 6.12: Checkout screen with **ap** command

Step 2

Type **ap** at the item prompt and press **<Return>**. If the reader has any current outstanding fines, this will bring up the reader's *Accounts Receivable* screen, where

details of these fines will display. [NB: If the reader has outstanding charges it will also be possible to display this screen via check in or via their blocks screen (see 6.18-9).]

If the reader does not have any current outstanding fines, the following prompt will display:

No outstanding charges - see account details (Y/N) ?

It will be possible to access the reader's Account History at this point by typing Y and pressing **<Return>**. Please proceed to Step 4. [NB: It is also possible to access the Account History of a reader without outstanding fines by entering **ap** at the checkin item prompt at the start of a checkin session and retrieving the reader.]

If the reader has never incurred a charge in your library, however, the following message will display:

No outstanding charges

Press **<Return>** to go back to the item prompt.

Step 3

Select the **Account History** option and press **<Return>**.

Step 4

A screen similar to the following will appear:

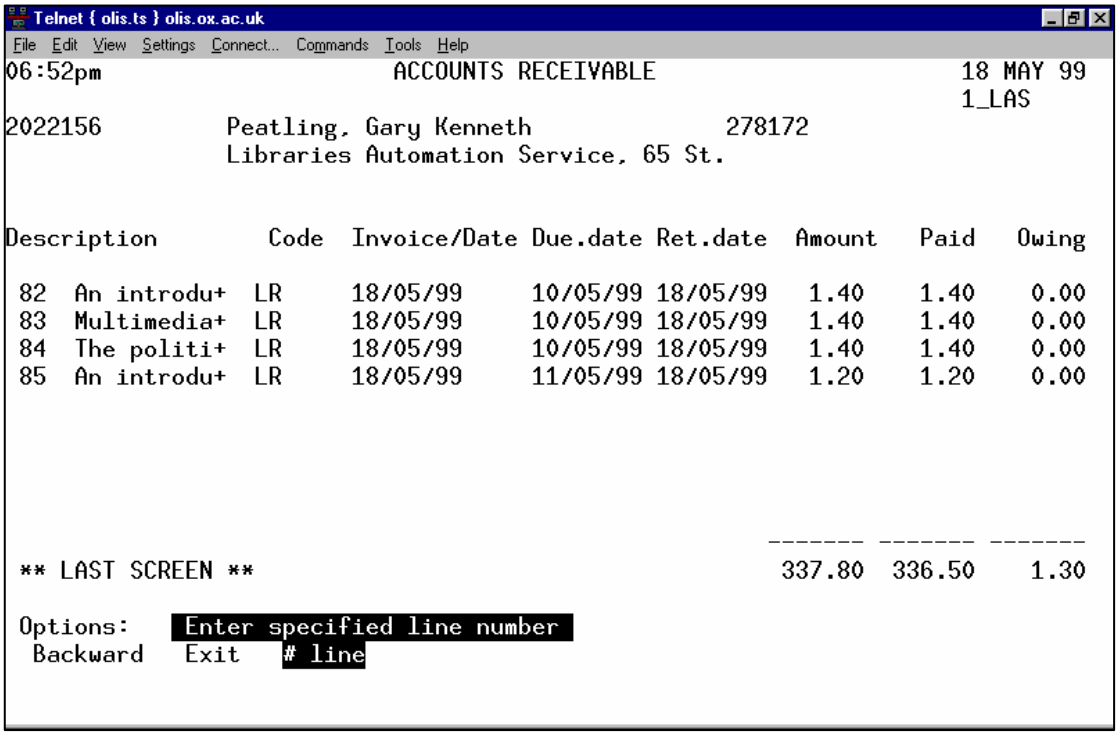

Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
06:52pm ACCOUNTS RECEIVABLE 18 MAY 99
1_LAS
2022156 Peatling, Gary Kenneth 278172
Libraries Automation Service, 65 St.
Description Code Invoice/Date Due.date Ret.date Amount Paid Owing
82 An introdu+ LR 18/05/99 10/05/99 18/05/99 1.40 1.40 0.00
83 Multimedia+ LR 18/05/99 10/05/99 18/05/99 1.40 1.40 0.00
84 The politi+ LR 18/05/99 10/05/99 18/05/99 1.40 1.40 0.00
85 An introdu+ LR 18/05/99 11/05/99 18/05/99 1.20 1.20 0.00
** LAST SCREEN ** 337.80 336.50 1.30
Options: Enter specified line number
Backward Exit # line

Fig. 6.13: Account History screen

This **Account History** screen will display all of the reader's current and past paid or waived fines in chronological order of when they were incurred. Details of each fine will be displayed on a distinct line in this screen. The title of the item on which the fine was incurred, a transaction code, and the due date for the loan and actual return date (for overdue fines) will also all be displayed on the relevant line. Sums for which payment is due or recorded (i.e., all fines not waived) will display in the *Amount* column, sums paid will display in the *Paid* column, and sums outstanding on each fine will display in the *Owing* column. The totals in each of these three columns will display at the bottom of the screen. The most recently incurred fines (i.e., *not necessarily* any fines which have not been paid) will display when one enters this screen, but if the reader has accumulated a large number of fines you will be able to scroll back to view earlier fines by selecting the **Backward** option and pressing **<Return>** (the totals displayed at the foot of the screen *will* include sums from such earlier fines).

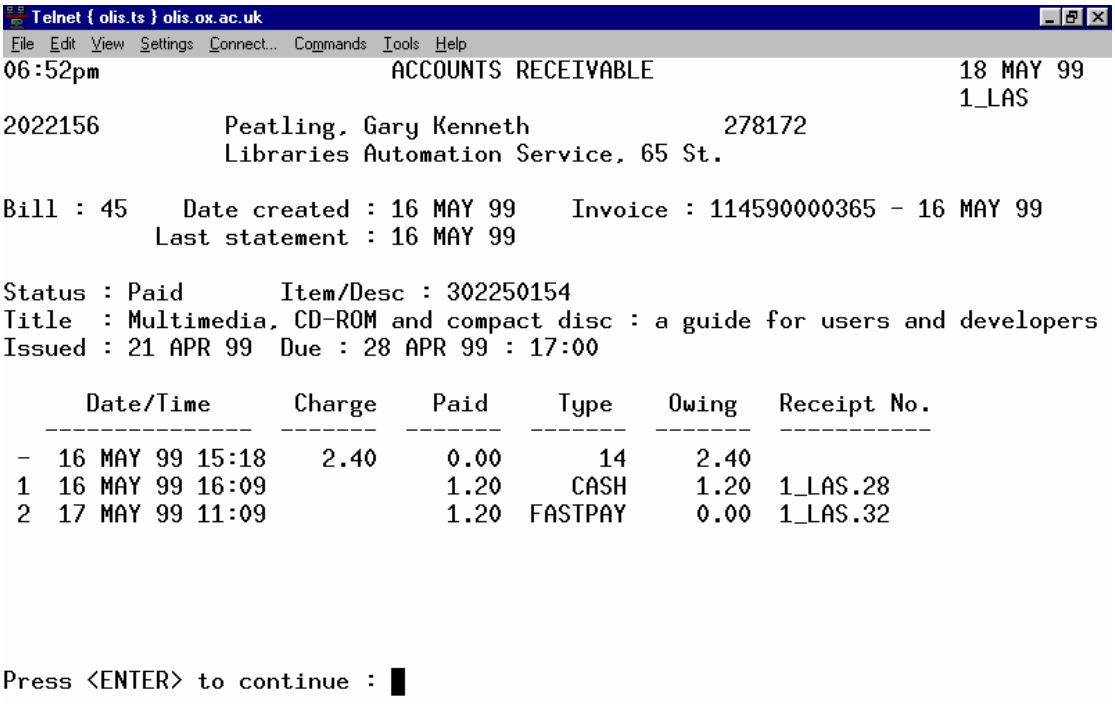
[NB: Any line in this screen with zero in the *Amount* field such as the following:

Description	Code	Invoice/Date	Due.date	Ret.date	Amount	Paid	Owing
102 An introdu+	LR	02/06/99	28/05/99	02/06/99	0.00		0.00

indicates a fine which was waived in full.]

Step 5

You may look more closely at any individual fine and how/when it has been paid and/or waived by selecting the **# line** option, typing the line number (e.g., **39**) and


Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
06:52pm ACCOUNTS RECEIVABLE 18 MAY 99
1_LAS
2022156 Peatling, Gary Kenneth 278172
Libraries Automation Service, 65 St.
Bill : 45 Date created : 16 MAY 99 Invoice : 114590000365 - 16 MAY 99
Last statement : 16 MAY 99
Status : Paid Item/Desc : 302250154
Title : Multimedia, CD-ROM and compact disc : a guide for users and developers
Issued : 21 APR 99 Due : 28 APR 99 : 17:00
Date/Time Charge Paid Type Owing Receipt No.
- 16 MAY 99 15:18 2.40 0.00 14 2.40
1 16 MAY 99 16:09 1.20 CASH 1.20 1_LAS.28
2 17 MAY 99 11:09 1.20 FASTPAY 0.00 1_LAS.32
Press <ENTER> to continue :

pressing **<Return>**. A screen similar to the following will appear:

Fig. 6.14: A fine history display from the Account History screen

This screen displays information as to when a fine was created, and how and when it was paid/waived off. In the example above, the fine of £2.40 was incurred on 16 May 1999 paid off in two instalments, one in cash (i.e., through AP) later the same day, and one through fastpay (i.e., presumably through checkin) the next day. Transactions are listed in date order. This screen is for display only; information cannot be edited here.

Step 6

Press **<Return>** to go back to the first Accounts History screen. Selecting **Exit** and pressing **<Return>** will take you back to the first *Accounts Receivable* screen, where fine payment and waiving can be registered (see above 6.10-8). Selecting **Exit** and pressing **<Return>** again will take you back to the checkout item prompt.

Press **<Return>** twice to go back to a circulation menu.

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Borrower Blocks

Introduction

Blocks are displays of information about a reader which will appear when a reader is performing certain types of transaction at your library (e.g., checking a book out). They are intended as a useful reminder that some piece of information should be passed onto the reader, or that some transaction(s) involving the reader is pending. They are also visible to the reader when they are undertaking a borrower enquiry via the OPAC or GeoWeb. This chapter explains the types of borrower blocks on the system, which include full (blacklisting) and partial (display) blocks. The procedure for adding, editing and deleting different kinds of block is described, as well as the circumstances in which different blocks will display.

Types of block

A reader's blocks can be displayed, and blocks added, edited or deleted, by accessing the reader's *Patron Blocks* screen. This screen will be displayed:

- By selecting the option for or typing the keyword **ctu** and pressing **<Return>** at any menu in the circulation module and retrieving the borrower, or
- By typing the command **b** and pressing **<Return>** at the checkout item prompt
- By selecting the **Blocks display** option and pressing **<Return>** at the first *Patron Registration* or CPR screen.

In addition, depending on the type of blocks against a borrower record, a reader's blocks screen may be displayed

- When accessing the holds processing screen (**HRT**, or through the command **h** at checkout (see 7.3-4 below))
- When an item is checked in for them.

When you are adding a block, it is possible to type a **??** and press **<Return>** to display a list of blocks and block type codes. The blocks that are most commonly used are those in the first screen. However library specific blocks can be set up and edited if this fits your requirements:

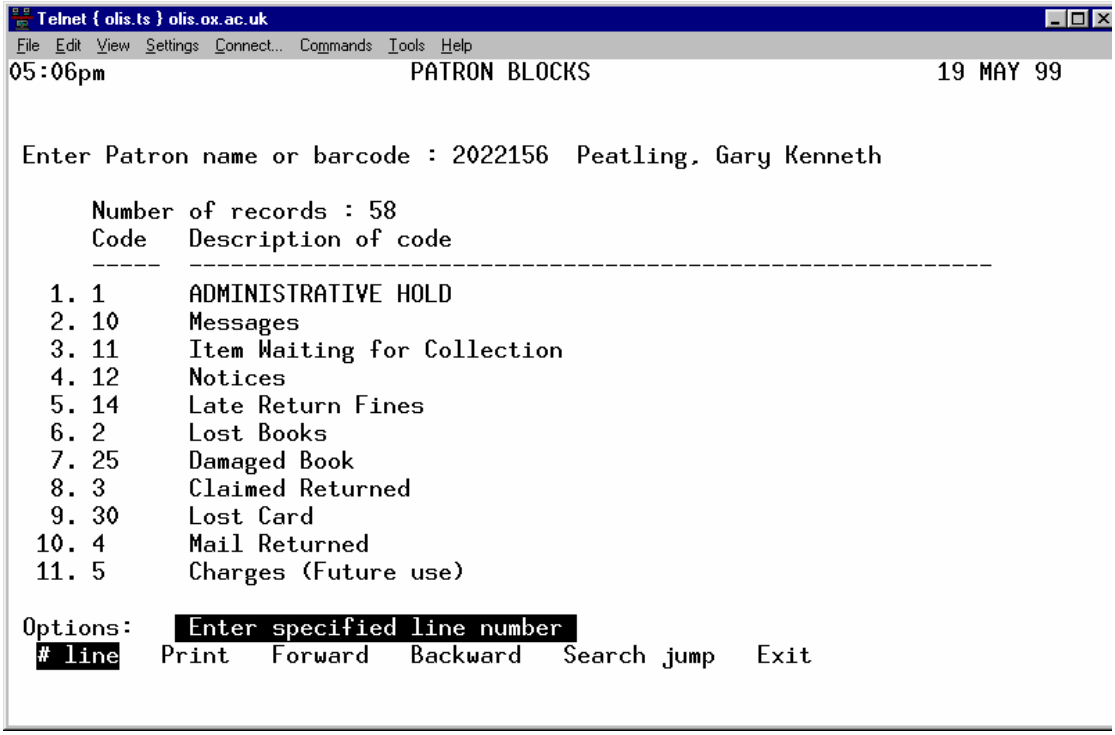
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
05:06pm PATRON BLOCKS 19 MAY 99
Enter Patron name or barcode : 2022156 Peatling, Gary Kenneth
Number of records : 58
Code Description of code
1. 1 ADMINISTRATIVE HOLD
2. 10 Messages
3. 11 Item Waiting for Collection
4. 12 Notices
5. 14 Late Return Fines
6. 2 Lost Books
7. 25 Damaged Book
8. 3 Claimed Returned
9. 30 Lost Card
10. 4 Mail Returned
11. 5 Charges (Future use)
Options: Enter specified line number
line Print Forward Backward Search jump Exit

Fig.6a.1: List of block types displayed through a Patron Blocks screen

Block types are configured with certain characteristics in order to fit the circumstances in which they are used. There are five particular features which vary from block to block;

- Whether the block has charges associated with it, and thus can only be edited or deleted through registering of the payment or waiving of fines.
- Whether or not the staff can add the block manually, or whether it is created automatically through other transactions on OLIS.

- If staff can delete the block directly, or whether it can only be deleted indirectly through other transactions taking place.
- Whether it is a full block (i.e., prevents borrowing or renewals by the reader until a specific transaction is performed) or a partial block. (i.e., does not prevent borrowing or renewals by the reader).
- Where the block will display - especially whether it will display in checkin.

The following table is a brief summary of the available types of block:

Table of block types

Block type	Can be placed manually?	Can be deleted directly?	Full?	Charge-related?[1]	Displays in CIN?
Administrative Hold	Yes	Yes	Yes[2]	No[3]	Yes
Messages	Yes	Yes	No	No	No
Item Waiting for Collection	No	No	No	No	Yes
Notices	No	Yes	No	No	No
Late Return Fines	No	No	No	Yes	No
Lost Books[4]	Yes	No	No	Yes	No
Damaged Book	Yes	No	No	Yes	No
Claimed Returned[4]	Yes	Yes	No	No	No
Lost Card	Yes	Yes[5]	Yes[6]	No	No
Charges (future use) [7]	Yes	No	No	Yes	No
Overdue Items	No	Yes	No	No	No
Expired Card[8]	No	No	Yes	No	No

Fig. 6a.2: Table of block types

Notes

1 Charge-related blocks cannot be edited or deleted apart from the waiving/paying of fines (see below 6a.12-3)

2 Administrative hold blocks are triggered by certain misdemeanours which readers may commit in your library, and have *some* of the features of a full block (see below, 6a.16-7).

3 Although Administrative holds are not in themselves charge related, they may be attached to patron records because of outstanding charges. It may therefore be the case that a specific Administrative hold block can be edited/deleted through registering the full/partial payment/waiving of fines (see below, 6a.17).

4 Do not confuse the Claimed Returned and Lost Books blocks respectively with the claim return and lost item flags (see above 4.13-5). These blocks allow one to link a record of the claimed return or loss of an item to a reader's borrower record, while the flags ensure an accurate display of status information in the OPAC concerning claimed returned/lost items. If an item is lost, you may wish to flag it as lost from a reader's item list, *and also to* attach a lost item block to a reader's record so that a replacement charge may be placed against the reader's record. (see below 6a.9-11). Similarly, if a reader claims to have returned an item, you may wish to flag it as a claimed return *and* to add a Claimed Returned block in the reader's block's screen in order to record the fact both against the item status and the borrower record.

5 So long as the block was placed in your library (see above, 2.13-9).

6 A lost card block is system-wide in its effects: until the block is deleted or the reader's barcode updated at the library which placed the block, they will be unable to borrow at any OLIS circulation library.

7 A specific Charges (future use) block for each library is available. Select the Search Jump option from this screen, press **<Return>**, type in your library's three-letter code *in upper case*, and press **<Return>** to view this option.

8 "Expired card" is a slight misnomer, since the block actually refers to the expiry of a reader's *membership*, i.e., their permissions to borrow in your library. The full block therefore only prohibits borrowing/renewal in your library (see 3.11), and can only be removed by extending the expiry date in the reader's patron record (see 1.13-4, 20).

We advise that other kinds of block (e.g., the Mail Returned block) should *not* be used.

Adding borrower blocks

As the above table shows, only some blocks can be added manually. There are also slightly different procedures for adding charge-related and non-charge related blocks.

Adding a non-charge-related block

Example - adding a Messages block

Messages blocks will display to staff in your library at check out and to the reader when they are undertaking a borrower enquiry via the OPAC or GeoWeb. These blocks can thus be used to display brief information which may be of interest to the reader and to staff.

Step 1

Type or select the option for **ctu** and press **<Return>** from any menu in the circulation module. At the

Enter Patron name or barcode :

prompt, wand in the reader's barcode or type in the readers name (in the format *surname, forename*) and press **<Return>**. If you use the reader's name, you will be presented with a browse list of reader's names alphabetically closest to the term you entered. Type in the line number of the borrower record you wish to retrieve and press **<Return>**.

Step 2

If the reader currently has blocks against their patron record, these will then display. Please proceed to Step 4. If the reader has no blocks against their patron record, the following message will appear

No Block Record present. Do you want to enter a block ? (Y/N)

Type **y** and press **<Return>** to access the reader's blocks screen.
[**NB**: If you are already in checkout, it is possible to access a reader's block screen without going through a circulation menu. If a reader has blocks against their borrower record, their blocks screen will be displayed when the borrower record is retrieved at the checkout borrower prompt. Please proceed to Step 4. If the reader has no blocks against their borrower record, type **b** at the item prompt and press **<Return>**. The "No Block Record present" prompt will appear. Type **y** and press **<Return>**.]

Step 3

A screen similar to that overleaf will appear:

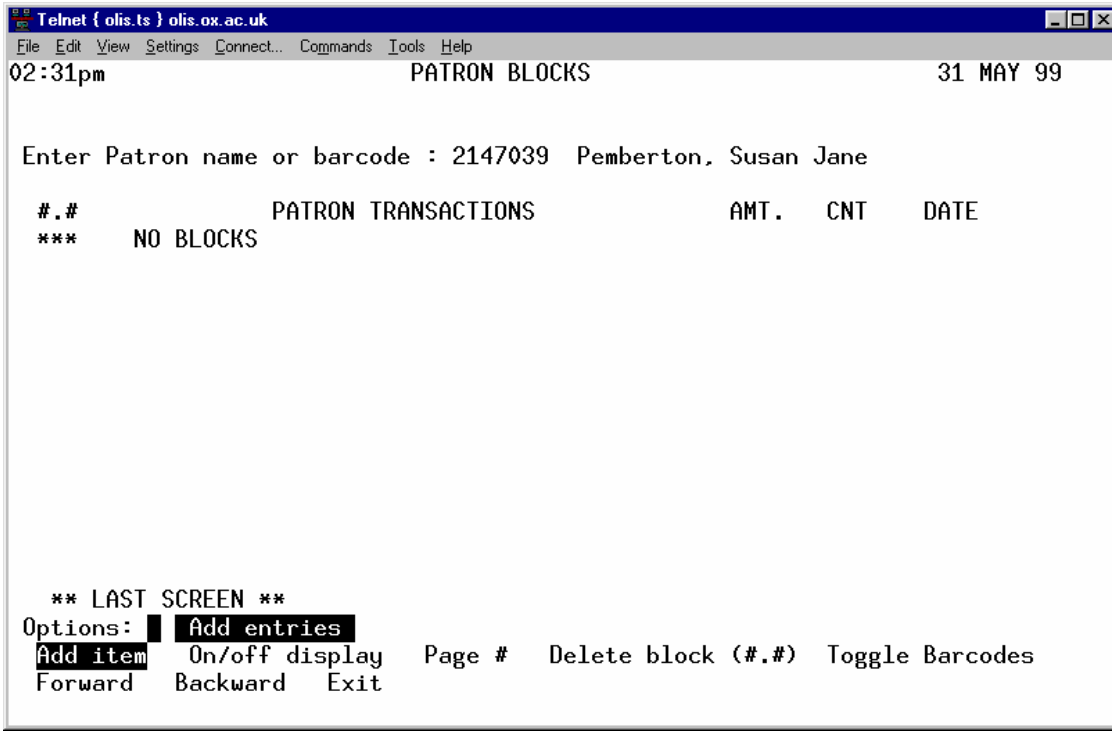
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
02:31pm PATRON BLOCKS 31 MAY 99
Enter Patron name or barcode : 2147039 Pemberton, Susan Jane
#.# PATRON TRANSACTIONS AMT. CNT DATE
*** NO BLOCKS
** LAST SCREEN **
Options: Add entries
Add item On/off display Page # Delete block (#.#) Toggle Barcodes
Forward Backward Exit

Fig. 6a.3: Blank Patron Blocks screen

Step 4

Select the **Add item** option and press **<Return>**. The following prompt will appear:

Enter block type code : _____

Step 5

Type **??** and press **<Return>** to see the list of block type codes. A screen similar to that overleaf will appear:

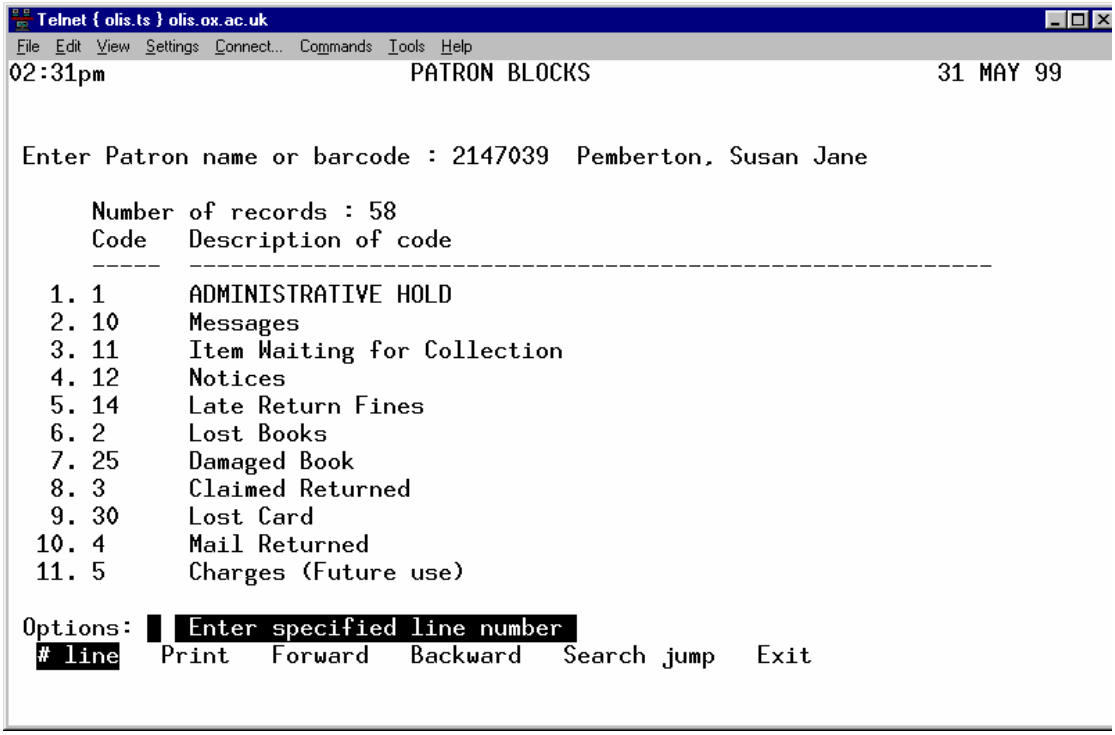
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
02:31pm PATRON BLOCKS 31 MAY 99
Enter Patron name or barcode : 2147039 Pemberton, Susan Jane
Number of records : 58
Code Description of code
1. 1 ADMINISTRATIVE HOLD
2. 10 Messages
3. 11 Item Waiting for Collection
4. 12 Notices
5. 14 Late Return Fines
6. 2 Lost Books
7. 25 Damaged Book
8. 3 Claimed Returned
9. 30 Lost Card
10. 4 Mail Returned
11. 5 Charges (Future use)
Options: Enter specified line number
line Print Forward Backward Search jump Exit

Fig. 6a.4: List of Block types displayed by typing **??** at the prompt for block code

NB: The need to type **??** to display this browse list can be avoided if you know the correct block type code (in this example, **10** for a Messages block), type it at the prompt and press **<Return>**. Note that the block type code is in the second column on this screen, and is usually *not* the same as the line number in the first column..

Step 6

Locate the type of block required, type in its *line number* (not its code) and press **<Return>**. (In this example, type **2** and press **<Return>** for a Messages block.). A prompt similar to the following will appear:

```
Enter Item Barcode or Block description :
** Messages
```

Step 7

Type in the text or message which you wish to display in this block and press **<Return>**. [NB: A maximum of forty characters will display in such a block.] The new block will now appear in the blocks screen:

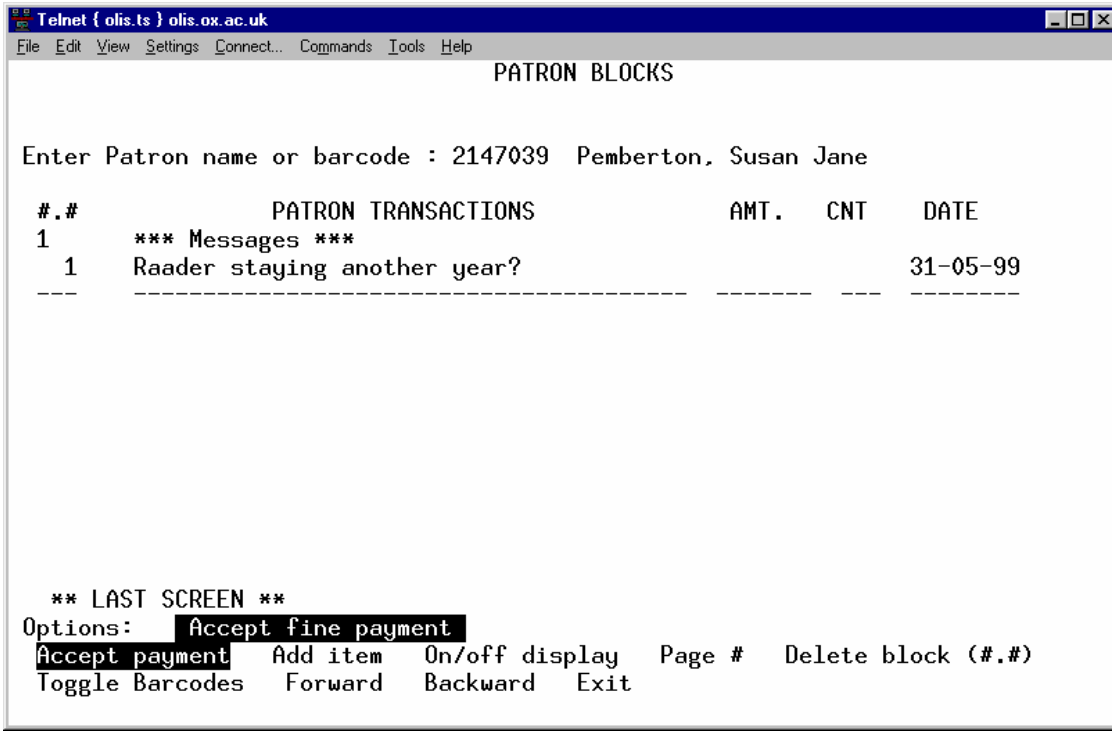
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
PATRON BLOCKS
Enter Patron name or barcode : 2147039 Pemberton, Susan Jane
#.# PATRON TRANSACTIONS AMT. CNT DATE
1 *** Messages ***
1 Raader staying another year? 31-05-99
** LAST SCREEN **
Options: Accept fine payment
Accept payment Add item On/off display Page # Delete block (#.#)
Toggle Barcodes Forward Backward Exit

Fig.6a.5: Messages block

Step 8

Select **Exit** and press **<Return>** to go back to the checkout item prompt or the CTU borrower prompt.

Adding a charge-related block

Example - adding a Lost Books block

The Lost Books block allows one to place a discretionary charge against a reader's borrower record by way of replacement charge when an item has been lost.

To add a Lost Books or Damaged Book block, it is necessary to have the correct barcode for the copy which has been lost or damaged. Note that a Lost Books block can only be added to a reader's borrower record in respect of an item currently registered as checked out to the reader. If you do not already have the correct barcode of a lost item, this can be obtained using the **# line** option from the reader's item list (see 4.7-8). To obtain the correct barcode for a damaged item if you do not already have it, also use the **# line** option from the reader's item list where possible, or search the catalogue by selecting or typing the keywords **SEARCH** or **CEH** at any menu in the circulation module (see Appendix B on CEH).

When adding a charge-related block such as a Lost book block, follow steps 1 to 4 above (6a.6-7) from adding a non-charge-related block. Then use the following guidelines:

Step 5

At the prompt:

Enter block type code : _____

Either type in the correct block type code if you know it (**2** in the case of the Lost Books block), or type **??** and press **<Return>** to see the list of block type codes, type in the line number of the required block (for example **6** for a Lost book block) and press **<Return>**. [Note that the block type code is *not necessarily* the same as its line number in the list of blocks.]

Step 6

A prompt similar to the following will appear:

```
Enter Item Barcode :
** Lost Books
```

Step 7

Wand in the item barcode, or type in the item barcode or other information depending on the prompt and press **<Return>**.

Step 8

If you have entered a barcode, the title of the item specified will display beneath the following prompt:

```
Enter charge amount :
```

It is possible to abort the adding of the block if desired here by pressing **<Return>**, then typing **N** (*in upper case*) and pressing **<Return>**. Otherwise type in the amount owing (e.g., **.8** for 80p, **5** for £5, **10.4** for £10.40) and press **<Return>**. You are taken back to the *Patron Blocks* screen where the new block will display.

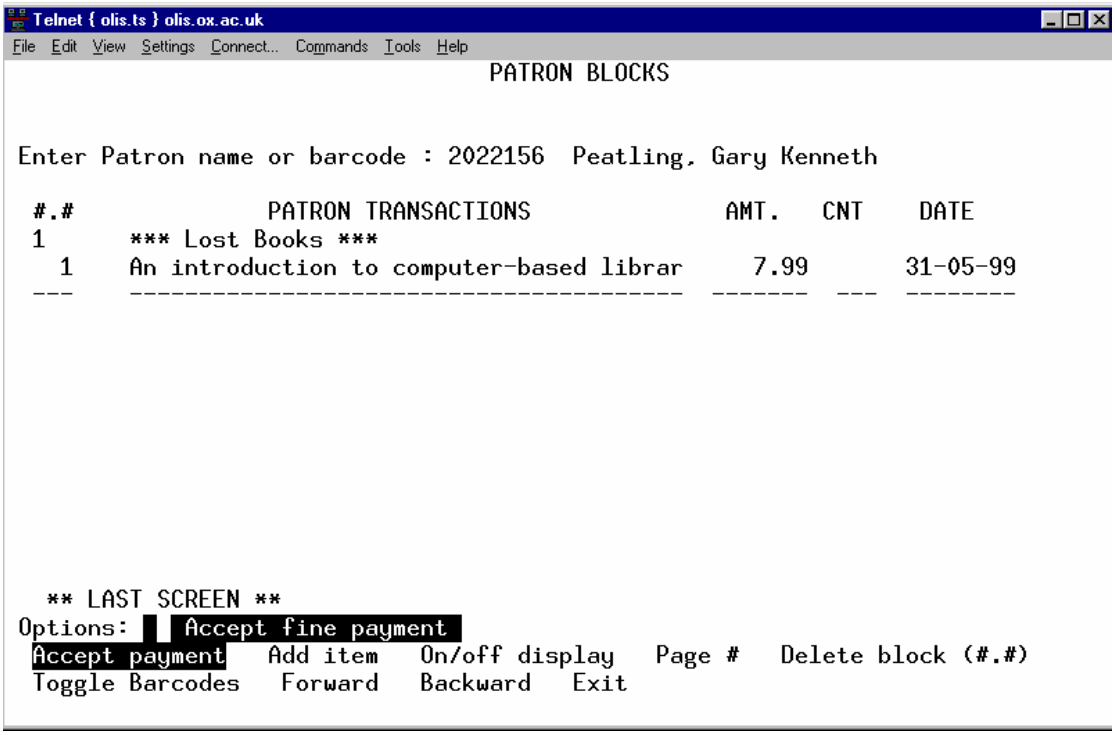
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
PATRON BLOCKS
Enter Patron name or barcode : 2022156 Peatling, Gary Kenneth
#.# PATRON TRANSACTIONS AMT. CNT DATE
1 *** Lost Books ***
1 An introduction to computer-based librar 7.99 31-05-99
** LAST SCREEN **
Options: Accept fine payment
Accept payment Add item On/off display Page # Delete block (#.#)
Toggle Barcodes Forward Backward Exit

Fig. 6a.6: Charge-related block (lost book block)

Charge-related blocks like Lost Books blocks, Damaged Book blocks and Late Return Fines blocks can only be edited or deleted through registering payment/waiving. If the amount outstanding in charge-related blocks exceeds a level which is determined in a library's setup tables, an administrative hold will also be automatically added to the borrower's record (see 6a.16 below).

Displaying the item barcode in a block

If for any reason you wish to check the barcode of an item displaying in (a) block(s), select the option **Toggle Barcodes** from the reader's *Patron Blocks* screen and press **<Return>**. The barcodes of any items featured in the reader's blocks will then display:

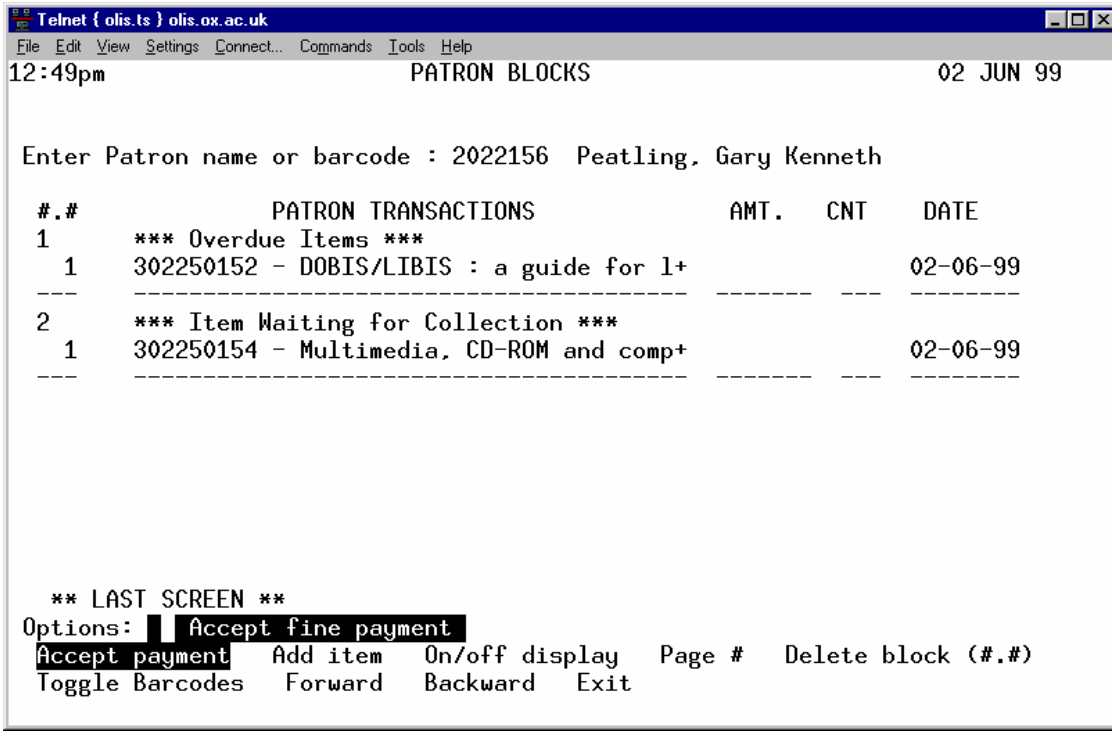
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
12:49pm PATRON BLOCKS 02 JUN 99
Enter Patron name or barcode : 2022156 Peatling, Gary Kenneth
#.# PATRON TRANSACTIONS AMT. CNT DATE
1 *** Overdue Items ***
1 302250152 - DOBIS/LIBIS : a guide for l+ 02-06-99
2 *** Item Waiting for Collection ***
1 302250154 - Multimedia, CD-ROM and comp+ 02-06-99
** LAST SCREEN **
Options: Accept fine payment
Accept payment Add item On/off display Page # Delete block (#.#)
Toggle Barcodes Forward Backward Exit

Fig. 6a.7: Patron Blocks screen with toggle barcode function activated

Note that the default setting is *not* to display the item barcodes in blocks in any reader's blocks screen when it is accessed at any point: the **Toggle Barcodes** option must be used every time you wish to display item barcodes in a reader's blocks screen.

If having used this option you wish to restore the fullest possible display of items' *titles* without leaving the reader's blocks screen, select the option **Toggle Barcodes** again and press **<Return>**.

Editing and deleting charge-related blocks

Some non-charge-related blocks can be deleted directly from the reader's blocks screen (see 6a.14-5 below on the procedure); Some non-charge-related blocks however can only be deleted indirectly through other transactions (see below 6a.15). Charge-related blocks can be edited and/or deleted using the **Accept payment** option from the blocks screen to alter the amount outstanding, or by otherwise registering the paying or waiving of fines (see above ch.6). Use the following guidelines:

Step 1

Select the option for or type **ctu** and press **<Return>** from any menu in the circulation module. At the prompt:

Enter Patron name or barcode :

wand in the reader's barcode, or type in the reader's name (in the format *surname, forename*) and press **<Return>**. If you use the reader's name, you will be presented with a browse list of reader's names alphabetically closest to the term you entered. Type in the line number of the borrower record you wish to retrieve and press **<Return>**.

NB: If you are in checkout, it is possible to access a reader's block screen without going through a circulation menu. If a reader has blocks against their borrower record, their blocks screen will be displayed when the borrower record is retrieved at the checkout borrower prompt.

Step 2

A screen similar to the following will appear:

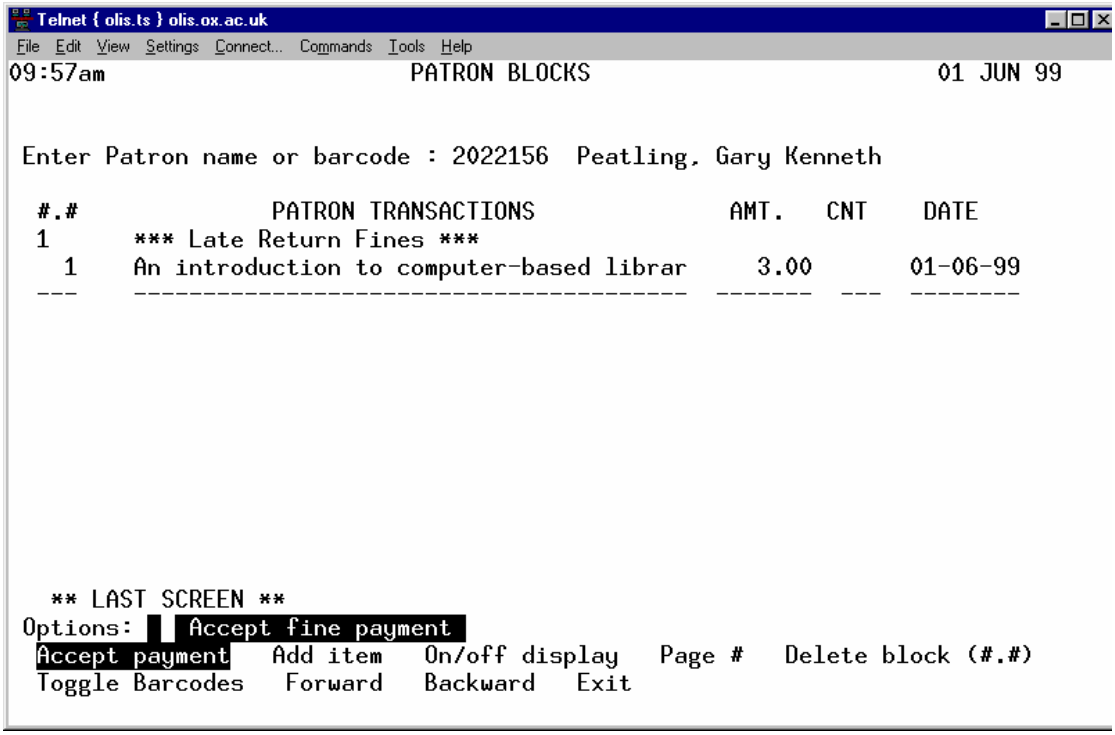
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
09:57am PATRON BLOCKS 01 JUN 99
Enter Patron name or barcode : 2022156 Peatling, Gary Kenneth
#.# PATRON TRANSACTIONS AMT. CNT DATE
1 *** Late Return Fines ***
1 An introduction to computer-based librar 3.00 01-06-99
** LAST SCREEN **
Options: Accept fine payment
Accept payment Add item On/off display Page # Delete block (#.#)
Toggle Barcodes Forward Backward Exit

Fig. 6a.8: Charge-related block with Accept Payment highlighted for editing/deletion

Select the **Accept payment** option and press **<Return>**. This will take you through to the reader's *Accounts Receivable* screen where fine payment or waiving in full or in part may be registered (see above 6.10-8). You will be taken back to the reader's *Patron Blocks* screen when you leave the Accounts Receivable screen. If you have registered full payment or waiving of the outstanding charges, all charge-related block(s) should be removed; if you have registered part payment or waiving of the outstanding charges, the blocks display will be altered accordingly.

Deleting non-charge related blocks

Some non-charge-related blocks can be deleted by using the **Delete block (#.#)** option from the bottom of the *Patron Blocks* screen.

Step 1

Select the option for or type **ctu** and press **<Return>** from any menu in the circulation module. At the prompt

Enter Patron name or barcode :

wand in the reader's barcode, or type in their name (in the format *surname, forename*) and press **<Return>**. If you use the reader's name, you will be presented with a browse list of reader's names alphabetically closest to the term you entered. Type in the line number of the borrower record you wish to retrieve and press **<Return>**.

NB: If you are in checkout, it is possible to access a reader's blocks screen without going through a circulation menu. If a reader has blocks against their borrower record, their blocks screen will display when the borrower record is retrieved at the checkout borrower prompt.

Step 2

The reader's blocks screen will appear. Select the **Delete block (#.#)** option, type in the line number of the block you wish to delete in the format **#.#** and press **<Return>**.

NB: The format **#.#** refers both to the number of the block and to the type of block. For example, if a reader has one Overdue Items block, the line number of the block might be **1.1**. If another type of block is then added (e.g., a Messages block), its line number will be **2.1**, but if a further Messages block is added, the line number of the second Messages block will be **2.2** (see Fig. 6a.9 below):

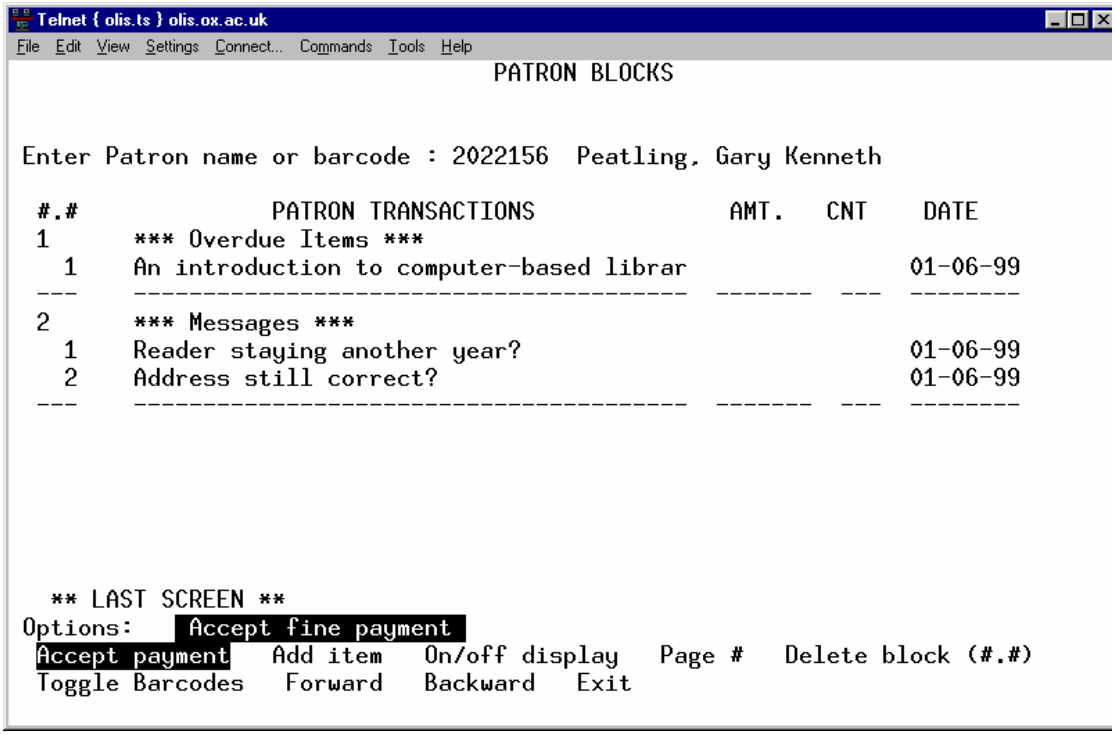
Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
PATRON BLOCKS
Enter Patron name or barcode : 2022156 Peatling, Gary Kenneth
#.# PATRON TRANSACTIONS AMT. CNT DATE
1 *** Overdue Items ***
1 An introduction to computer-based librar 01-06-99
2 *** Messages ***
1 Reader staying another year? 01-06-99
2 Address still correct? 01-06-99
** LAST SCREEN **
Options: Accept fine payment
Accept payment Add item On/off display Page # Delete block (#.#)
Toggle Barcodes Forward Backward Exit

Fig.6a.9: Patron Blocks screen with multiple blocks

If one wished to delete the second Messages block in this screen, it would be necessary to select the **Delete block (#.#)** option, type in 2.2, and then press **<Return>**.

Step 3

The block you wish to delete should be removed. Select **Exit** and press **<Return>** to leave the reader's blocks screen.

Block cannot be manually deleted

Certain kinds of block cannot be deleted directly, i.e., using the **Delete block (#.#)** option (see the table on 6a.4-5). If you attempt to use this option to delete blocks that have charges attached, or certain non-charge-related blocks, the following message will display:

This Block cannot be manually deleted. Please press<ENTER> :

Charge-controlled blocks are automatically deleted when the full payment or waiving of the attached charge is registered (see above, 6a.12-3).

Two types of non-charge-related block cannot be deleted directly, but can only be deleted indirectly through other transactions.

- The Item Waiting for Collection block, which can only be deleted either by the item for collection being checked out to the reader, or by the reservation being cancelled.
- The Expired Card block, which can only be deleted by the expiry period of the reader's membership being extended.

[Note that an Overdue Items block *can* be deleted directly, although it is unlikely that you would need or wish to do this.]

Administrative Holds

Administrative Hold blocks have some of the characteristics of full blocks, in that when a reader is on administrative hold at your library , they will be prevented from borrowing or renewing items from your library. An Administrative Hold block will also prevent a reader from using remote functions (i.e., remote renewals and remote reservations) on a system-wide basis.

When a reader is on administrative hold, the following message will display when their borrower record is retrieved at check out in the affected library:

This patron is on administrative hold. Do you wish to override? (Y/N) :

It is possible for staff to override the administrative hold at this point and permit checkout/renewal transactions **without** the underlying problems having been resolved by typing **y** and pressing **<Return>**. However, if you override the block in this way, the same prompt will appear on the next occasion that the borrower's record is retrieved at check out. It is more likely therefore that you would either wish to enforce the administrative hold until the underlying problem has been resolved, or (in certain circumstances) delete the Administrative Hold block outright.

Administrative Hold blocks can be applied to a reader's record in one of two ways:

1, Their application is triggered when a reader has already committed certain misdemeanours with which other blocks are associated, i.e.,

- When they have exceeded the maximum number of Claimed Returned blocks allowed for the relevant patron membership,
- When they have exceeded the maximum number of Overdue Items blocks for the relevant patron membership, or
- When they have exceeded the maximum outstanding debt (i.e., their total fines outstanding in charge-related blocks exceeds this maximum) for the relevant patron membership.

These three maximums which control the automatic application of such administrative holds to readers can be altered in your library set up, respectively in fields 4, 5 and 6 of the second screen of CPMC (see Circulation Set Up Manual, 7.13-4, 23).

While other blocks (i.e., Claimed Returned blocks, Overdue Items blocks, Late Return Fines blocks, Damaged Book blocks and Lost Books blocks) thus do not in themselves enforce any temporary prohibition on the reader borrowing/renewing items from your library, depending on what other blocks a reader has, and upon maximums which can be controlled in your library's setup tables, when any of these blocks is placed against a reader (manually or automatically) it may effectively place the reader on administrative hold by transgressing one of these three limits.

2, Administrative Hold blocks can also be added to a reader's record manually after they have committed some misdemeanour which is thought at the discretion of the library to be sufficient to warrant the temporary suspension of their local borrowing privileges (and of their ability to use remote functions). A very common example is

when a loan is sufficiently overdue to generate a suspension, "invoice" or final overdue notice. Ultimately it is hoped that it will be possible for an Administrative Hold block automatically to be placed against a reader in these circumstances, but in the intervening period it is possible for LAS to send libraries regular reports on request listing those readers for whom such notices have been generated.

Deleting Administrative Holds

Depending on how the administrative hold has been applied to a reader, it is possible to delete the Administrative Hold block in one of two ways:

1, If the Administrative Hold block has been applied automatically through other blocks against a reader's record, the Administrative Hold block will automatically be removed when the other blocks are sufficiently edited and/or deleted to take the reader below the maximum which they had initially breached. This will *not necessarily* mean that all or any of their other blocks must be deleted in order to delete the Administrative Hold block. For instance if the reader initially incurred an Administrative Hold block by breaching the maximum debt outstanding, the Administrative Hold block can be deleted by registering the payment/waiving of enough of their outstanding fines to take them below the maximum level (i.e., not necessarily all of their outstanding fines).

2, It is possible to delete Administrative Hold blocks directly from the *Patron Blocks* screen (using the **Delete block (#.#)** option). It is most likely that you would do this having added the Administrative Hold block manually after a suspension/"invoice"/final overdue notice for a reader's loan of an item had been generated: once the item were returned to your library, it is likely you would wish to remove the administrative hold. It is also possible directly to delete administrative holds which have been added automatically to a reader's record, but it is likely that you would rather wish to wait for the underlying problem to be resolved and thus for the administrative hold to be removed automatically.

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Reservations and Recalls

This chapter includes:

1, Guidelines on how to place and cancel reservations (or *holds*) on the staff side of OLIS. When a reservation is placed, it is possible to change a variety of conditions which determine how the hold may be filled, particularly the scope of the hold (i.e., whether it can capture only a particular copy, or any copy of a title in a particular library, or any copy of a title system-wide). Instructions on how to change these conditions are included in this chapter. Guidelines are also given for deleting holds.

2, Guidelines on recalling an item. Placing a recall on an item can generate a request (printed or emailed) to its current borrower to return an item to the library: this can thus be useful when an item is required by another reader. It is also possible to change the due date (and time) of the item when placing a recall.

Basic guide to placing a title reservation

It is possible for readers to place reservations via the OPAC (or GeoWeb) against the holdings of OLIS circulation libraries, though this option can be suppressed at the discretion of the circulating library (see Circulation Set Up Manual, 7.24-8 on the MEMSCP table). However, fewer parameters can be altered by readers placing reservations than by staff (see below 7.16), so sometimes it will be necessary for staff to place reservations on behalf of readers.

The majority of reservations which you will need to place are title reservations, i.e., reservations which can be filled by any copy of a particular title in your library. The following guidelines explain the basic procedure for placing such a reservation.

Step 1

Type (or select the option for) **hrt** from any menu in the circulation module. The *Holds Processing* screen will appear:

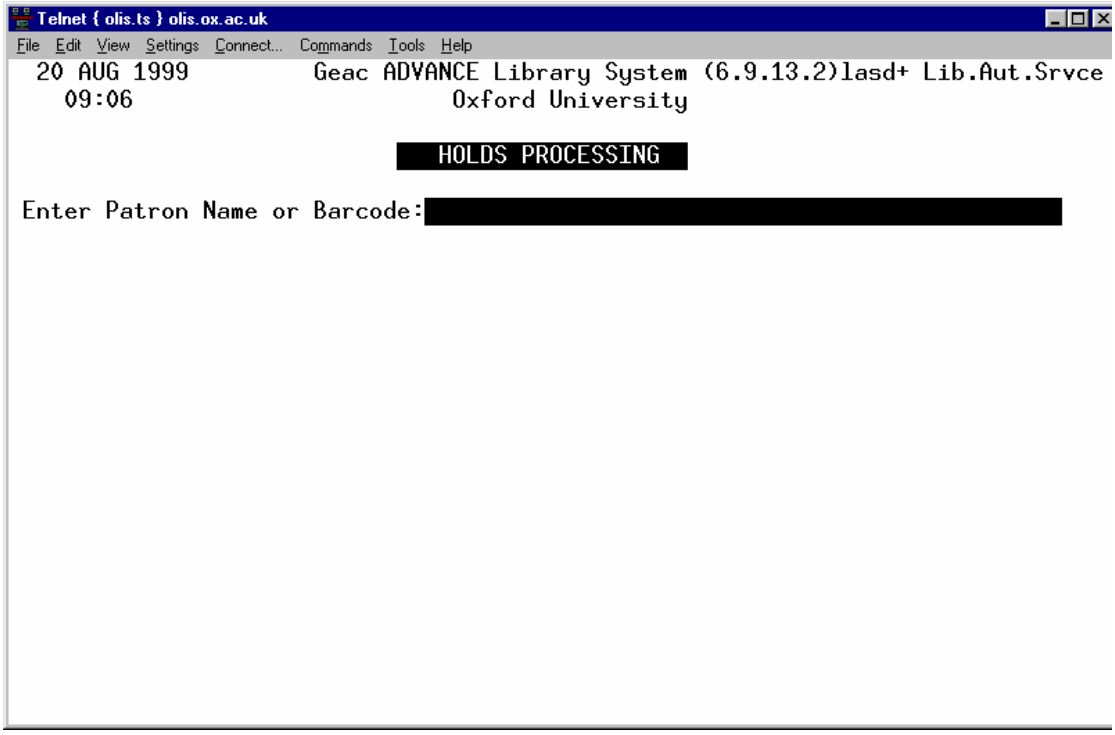

Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
20 AUG 1999 Geac ADVANCE Library System (6.9.13.2)lasd+ Lib.Aut.Srvce
09:06 Oxford University
HOLDS PROCESSING
Enter Patron Name or Barcode:

Fig. 7.1: Blank Holds Processing screen

Step 2

At the prompt

Enter Patron Name or Barcode:

wand in the borrower's barcode, or type in their name in the format *surname, first name* (e.g., **peatl**, or **peatling g**) and press **<Return>**. If you have entered a name, a browse list of reader's names alphabetically closest to your search term will appear: locate the correct borrower, type the line number and press **<Return>**. [NB: Any blocks against the reader's name may display at this point. If the reader's blocks

screen does appear, select **Exit** and press <**Return**> to continue with placing the hold.]

A screen similar to the following will then appear:

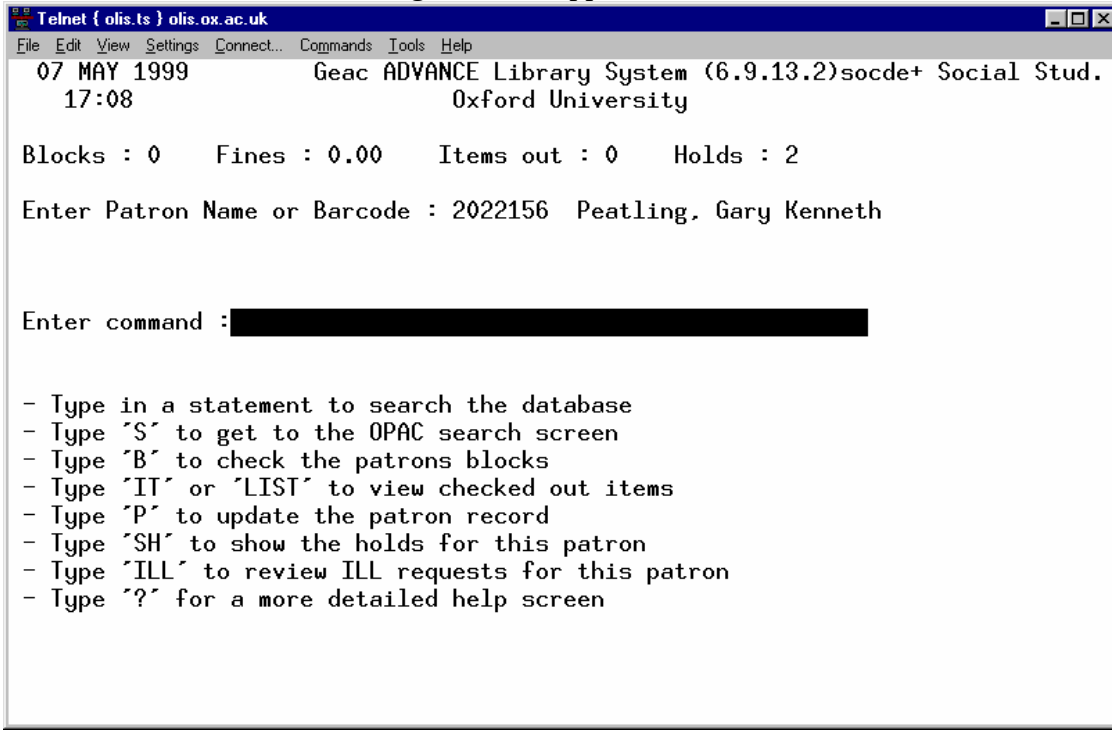

Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
07 MAY 1999 Geac ADVANCE Library System (6.9.13.2)socde+ Social Stud.
17:08 Oxford University
Blocks : 0 Fines : 0.00 Items out : 0 Holds : 2
Enter Patron Name or Barcode : 2022156 Peatling, Gary Kenneth
Enter command :
- Type in a statement to search the database
- Type 'S' to get to the OPAC search screen
- Type 'B' to check the patrons blocks
- Type 'IT' or 'LIST' to view checked out items
- Type 'P' to update the patron record
- Type 'SH' to show the holds for this patron
- Type 'ILL' to review ILL requests for this patron
- Type '?' for a more detailed help screen

Fig. 7.2: Holds Processing screen

[NB: If you are at the checkout screen with the borrower for whom you wish to place a hold retrieved, it is possible to go straight to this screen by typing **h** at the item prompt and pressing **<Return>**].

As listed on this screen, the command **p** can be entered at this prompt to access the borrower record, the command **it** to access the reader's list of items currently out on loan, the command **sh** to display and edit or delete the reader's current holds (see below, 7.12-4, 16-21) or the command **b** to access their blocks screen.

Step 3

At the prompt:

Enter command :

type **s** and press **<Return>**. The staff OPAC search screen will appear.

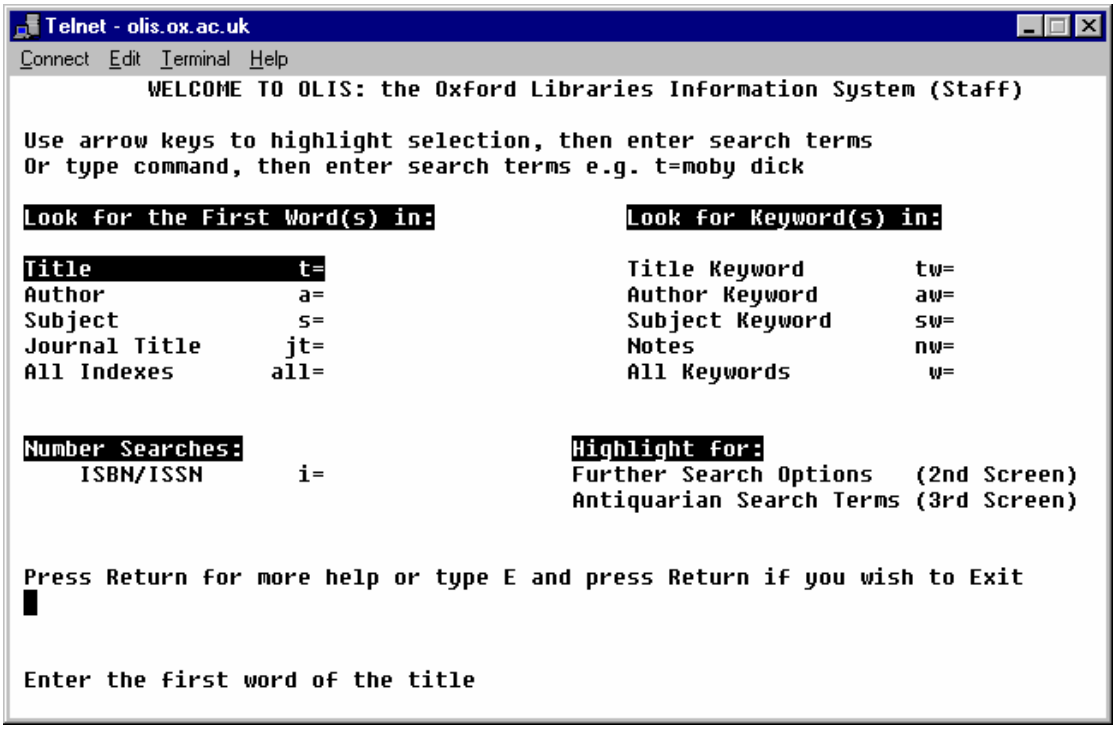

Telnet - olis.ox.ac.uk
Connect Edit Terminal Help
WELCOME TO OLIS: the Oxford Libraries Information System (Staff)
Use arrow keys to highlight selection, then enter search terms
Or type command, then enter search terms e.g. t=moby dick
Look for the First Word(s) in:
Look for Keyword(s) in:
Title t=
Author a=
Subject s=
Journal Title jt=
All Indexes all=
Title Keyword tw=
Author Keyword aw=
Subject Keyword sw=
Notes nw=
All Keywords w=
Number Searches:
ISBN/ISSN i=
Highlight for:
Further Search Options (2nd Screen)
Antiquarian Search Terms (3rd Screen)
Press Return for more help or type E and press Return if you wish to Exit
Enter the first word of the title

Fig. 7.3: Staff OPAC search screen

From here you may use any search command to locate the required title (e.g. t= to browse by title, c= to browse for the shelfmark, or i= to search for the ISBN). Please see the OPAC staff pocket reference guides (available from LAS in leaflet form), or the OPAC reader pocket reference guides (in leaflet form or at http://www.lib.ox.ac.uk/olis/).

ÐTip Ð It is possible to bypass the staff OPAC search screen by directly entering any appropriate online searching command at the *Enter command:* prompt on the previous screen.

For example, type: **t =political diaries**

at this prompt and press **<Return>**.

Step 4

Then access the *Detailed Display* screen for the title you wish to reserve. Choose the **Retrieve** option and press **<Return>**.

A *Library Locations* screen such as the following will appear.

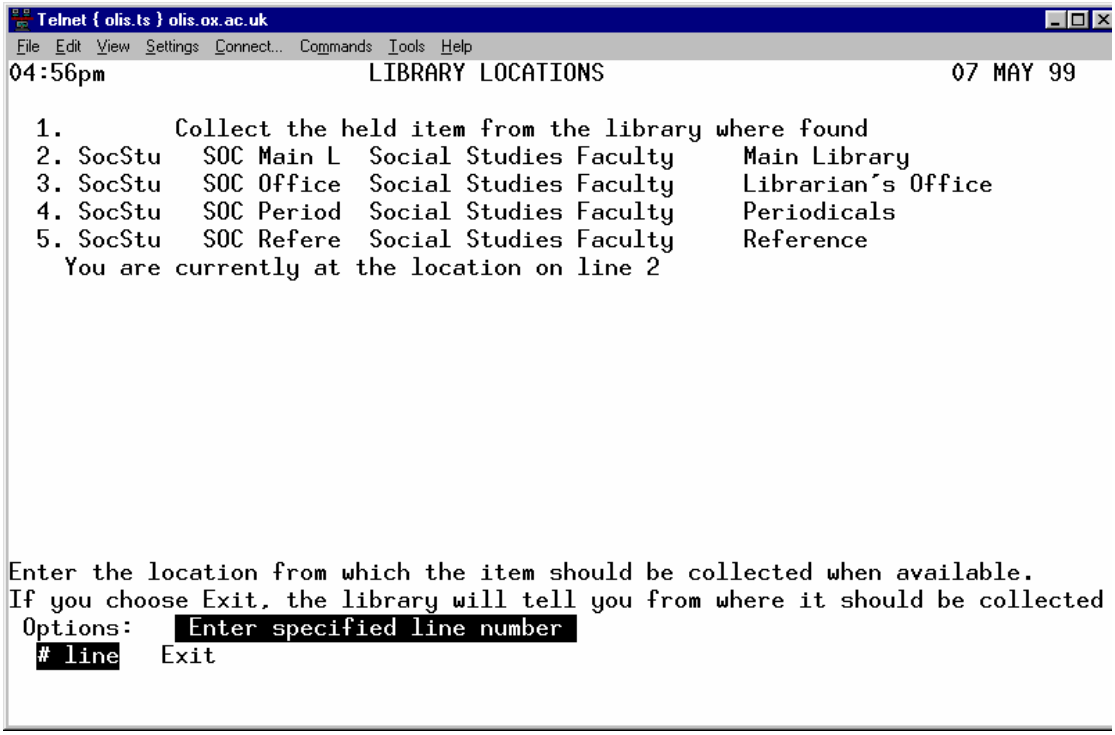

Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
04:56pm LIBRARY LOCATIONS 07 MAY 99
1. Collect the held item from the library where found
2. SocStu SOC Main L Social Studies Faculty Main Library
3. SocStu SOC Office Social Studies Faculty Librarian's Office
4. SocStu SOC Period Social Studies Faculty Periodicals
5. SocStu SOC Refere Social Studies Faculty Reference
You are currently at the location on line 2
Enter the location from which the item should be collected when available.
If you choose Exit, the library will tell you from where it should be collected
Options: Enter specified line number
line Exit

Fig. 7.4: Library Locations screen

Step 5

At this point you will usually type n, where *n* is the number mentioned on the line "You are currently at the location on line *n*" in this screen (usually this number will be 2), and press **<Return>**. This specifies that if/when the hold is filled, the item will be collected at your library.

A *Hold Detail* screen similar to the following will appear:

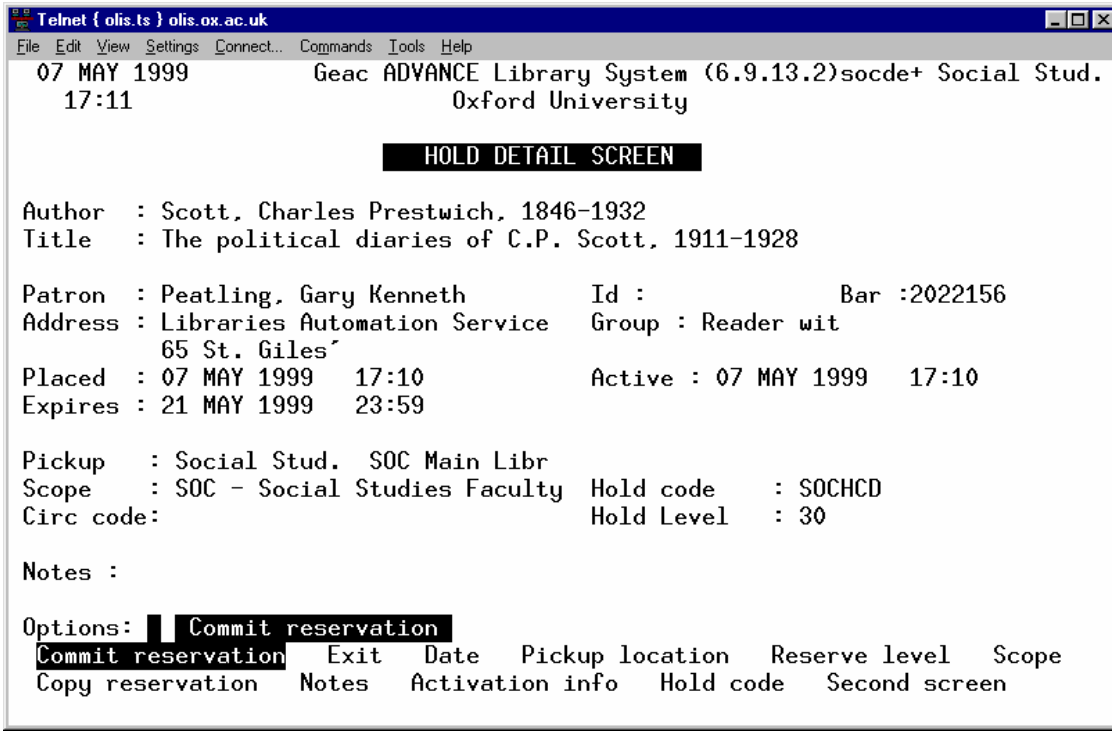

Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
07 MAY 1999 17:11 Geac ADVANCE Library System (6.9.13.2)socde+ Social Stud.
Oxford University
HOLD DETAIL SCREEN
Author : Scott, Charles Prestwich, 1846-1932
Title : The political diaries of C.P. Scott, 1911-1928
Patron : Peatling, Gary Kenneth Id : Bar :2022156
Address : Libraries Automation Service Group : Reader wit
65 St. Giles'
Placed : 07 MAY 1999 17:10 Active : 07 MAY 1999 17:10
Expires : 21 MAY 1999 23:59
Pickup : Social Stud. SOC Main Libr
Scope : SOC - Social Studies Faculty Hold code : SOCHCD
Circ code: Hold Level : 30
Notes :
Options: Commit reservation
Commit reservation Exit Date Pickup location Reserve level Scope
Copy reservation Notes Activation info Hold code Second screen

Fig. 7.5: Hold Detail screen

Step 6

If all information is accurate and correct, then place the reservation by selecting the **Commit reservation** option and pressing **<Return>**. (For other options at this point, see below, 7.7-12.)

Step 7

If the hold has been placed successfully, you will be returned to the *Holds Processing* screen. Press **<Return>** twice to go back to a circulation menu.

ÐPLEASE NOTEÐ

If a copy of the item is available in your library, a warning similar to the following will display:

```
There IS an item available at Lib.Aut.Srvce
Continue (Y/N) ?
```

It will still be possible to place a reservation on this item if desired by typing **y** and pressing **<Return>** (this option may be useful if the reader themselves is not present as you are placing the hold). However, please note that if you place a reservation on an item which has a copy or copies available in your library, other readers will still be able to borrow these copies - you will not be warned about the existence of the hold until a copy of the item is checked back in.

If copies are available, however, it will frequently be more convenient simply to inform the reader. To abort placing the hold in these circumstances, press **<Return>** or type **n** and press **<Return>**. The following prompt will then appear:

```
No copies of this title may be held
Continue (Y/N) ? n
```

Press **<Return>** once more, or type **n** and press **<Return>**. Then select **Exit** and press **<Return>** to go back to the *Holds Processing* screen. Press **<Return>** twice to return to a circulation menu.

Reserving variations

It is possible to alter some of the conditions of a hold when placing it within the *Hold Detail* screen. This might particularly be desired when restricting the scope of a reservation (to a single copy), or when widening the scope of a reservation.

I) Placing a copy reservation

If a title reservation is placed on a journal or a multi-volume title, the hold could be filled by any volume in the set. It is more likely that a reader would be interested in reserving a particular issue/volume in these circumstances. It is possible, when staff place reservations, for an individual copy to be selected in the *Hold Detail* screen. Note that as this option is not currently available to readers, readers should be encouraged to ask staff to place reservations on issues of journals or multi-volume works for them. Copy reservations are *not* necessarily higher in priority than title

reservations for the same item; each will be satisfied in the order in which they are placed.

[Please note that there are two drawbacks even to the process of staff placing copy reservations. Firstly the listing of copies is fairly indiscriminate, so that selecting the correct copy to reserve is not a trivial task, and may be prohibitively time-consuming: a solution to this problem is being sought. Secondly it is not possible to select a range of copies to reserve at this point, though this too is under investigation. This means currently that if a library has several copies, e.g., of a particular serial issue, the only way to ensure that a reader obtains the first copy of this issue to be returned to the library is to place a copy hold on all individual copies - the holds on the copies which are not the first returned would then have to be cancelled when the reservation was filled.]

To place a copy reservation, follow steps 1 to 5 from the above guidelines (7.3-6) for placing a title reservation, then proceed as follows:

Step 6

At the *Hold Detail* screen, instead of selecting **Commit reservation** choose **Copy reservation** and press **<Return>**. The *Pieces Summary (Holds)* screen will appear:

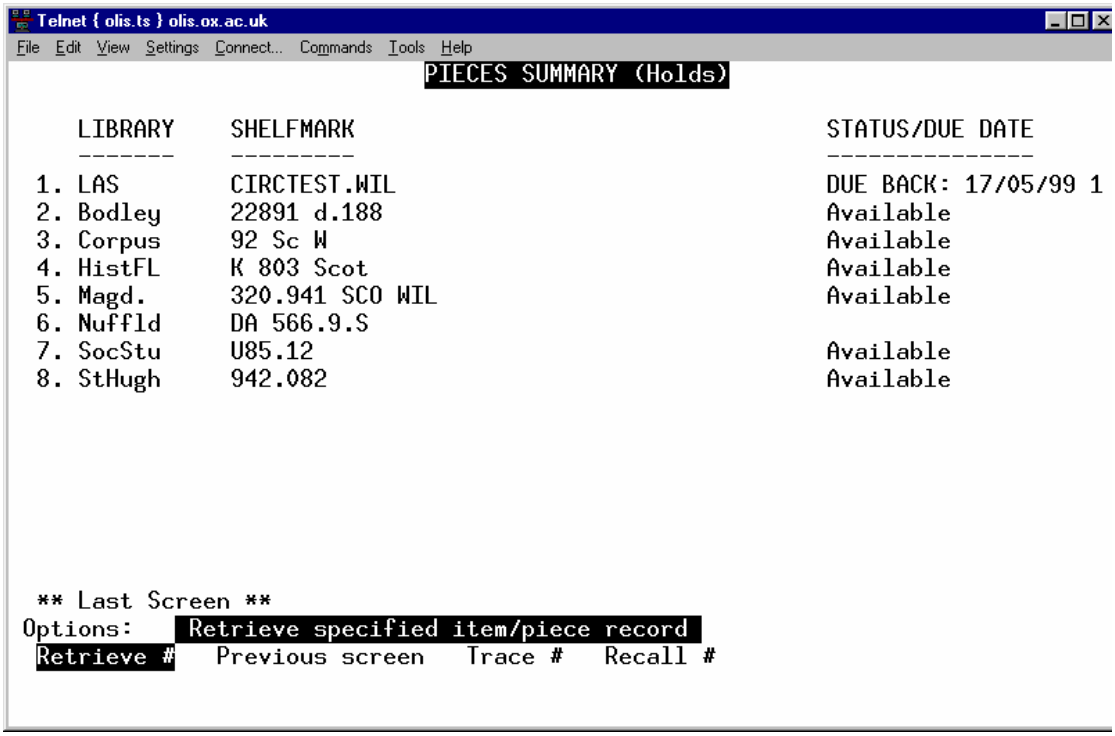

Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
PIECES SUMMARY (Holds)
LIBRARY SHELFMARK STATUS/DUE DATE
1. LAS CIRCTEST.WIL DUE BACK: 17/05/99 1
2. Bodley 22891 d.188 Available
3. Corpus 92 Sc W Available
4. HistFL K 803 Scot Available
5. Magd. 320.941 SCO WIL Available
6. Nuffld DA 566.9.S
7. SocStu U85.12 Available
8. StHugh 942.082 Available
** Last Screen **
Options: Retrieve specified item/piece record
Retrieve # Previous screen Trace # Recall #

Fig. 7.6: Pieces Summary (Holds) screen

Step 7

Locate the copy that you wish to reserve: **Forward** and **Backward** options will be available if the copies on OLIS fill more than one screen. (**NB**: note that for some issues of journals the listing of copies may appear indiscriminate and the correct copy may be extremely difficult to locate if there are many copies on the system). Then

select the **Retrieve #** option, type in the line number of the copy (e.g., **1**) and press **<Return>**. The *Hold Detail* screen reappears with the following entry in the *Scope* field:

Scope : Copy hold for 3xxxxxxxx

In other words the single copy you have selected will become the scope of your hold, and only the return to the library of that copy would fill the hold.

Step 8

If all information in the *Hold Detail* screen is accurate and correct, place the reservation by selecting the **Commit reservation** option and pressing **<Return>**.

Step 9

If the hold has been successfully placed you will be returned to the Holds Processing screen. Press **<Return>** twice to go back to a circulation menu.

2) Widening the scope of a reservation

By default the scope of your hold will usually be your library, as will be indicated by the appearance of its three-letter library code in the *Scope:* field of the *Hold Detail* screen. However, it is possible to widen the scope of a hold, so that it would be satisfied by the return of the first copy at any OLIS circulation library at which the reader has borrowing permissions: this should only rarely be necessary, but might be desirable, for instance, if a reader requires the title particularly urgently. This is done by giving the hold a system-wide scope.

To place a system-wide reservation, follow steps 1 to 5 from the above guidelines (7.3-6) for placing a title reservation, then proceed as follows:

Step 6

At the *Hold Detail* screen, select the **Scope** option. The cursor will appear in the *Scope:* field. Then type an asterisk (*****) and press **<Return>**. *System wide* will appear in the scope field.

Step 7

When placing such a system-wide hold, it is *important* that **(Pickup where held)** is entered in the *Pickup:* field in the Hold Detail screen. Unless this is done, confusion is possible on different parts of the system when the hold is filled. If this field is not completed in this way, select the option **Pickup location** and press **<Return>**. The *Library Locations* screen will appear. Select the **# line** option, type **1** and press **<Return>**.

Step 8

Select the **Commit reservation** option and press **<Return>** to place the hold. If the hold is successfully placed, you will be taken back to the Holds Processing screen. Press **<Return>** twice to go back to a circulation menu.

NB: When placing a reservation with a system-wide scope, you will be alerted not just if a copy of the title is available in your library, but in any OLIS circulation library at which the reader has borrowing permissions. A warning similar to the following will display:

```
There IS an item available at Corpus Chr.
Continue (Y/N) ?
```

It will still be possible to place a reservation on this item if desired by typing **y** and pressing **<Return>** (this option may be useful if the reader is not present as you are placing the hold). However, please note that if you place a reservation on an item which has a copy or copies available, other readers will still be able to borrow these copies - the hold will not be filled until a copy of the item is checked back in.

If copies are available and you do not wish to place the hold, press **<Return>** or type **n** and press **<Return>** and inform the reader where that the item is available. The following prompt will then appear:

```
No copies of this title may be held
Continue (Y/N) ? n
```

Press **<Return>** once more, or type **n** and press **<Return>**. Then select **Exit** and press **<Return>** to go back to the Holds Processing screen. Then press **<Return>** twice to go back to a circulation menu.

3) Changing the dates between which a hold will apply

By default each hold will apply from the date and time at which it is placed and will expire (if not filled in the intervening period) on a date which is determined by your library's set up. It is however possible to change these defaults in the Hold Detail screen

a) Changing the expiry date

If you know that an item will only be useful to a reader before a certain date, it may be beneficial to change the default expiry date for the hold to a date closer to the current date. In rarer circumstances, it may be desired to move this date further into the future.

Follow steps 1 to 5 from the above guidelines (7.3-6) for placing a title reservation, then proceed as follows:

Step 6

From the *Hold Detail* screen, select the **Date** option and press **<Return>**. The cursor will appear in the *Expires:* field.

Step 7

Type in the date at which you wish the hold to expire if not filled in the intervening period. This date can be entered in the formats DD.MM.YY, DD/MM/YY, or DD-MM-YY, etc., as well as formats including a four-digit year, but will appear in the format 12 JUN 1999 (it is not necessary to enter the year if the expiry date falls in the current calendar year). Then press **<Return>**.

Step 8

The cursor will then appear in the field for expiry time. It is unlikely that you would need to alter this, so just press **<Return>** to accept the default.

Step 9

The cursor will go back to the option bar. You may change any other conditions of the hold desired, or you may select the **Commit reservation** option and press **<Return>**. If the hold is successfully placed, you will be taken back to the Holds Processing screen, and may press **<Return>** twice more to go back to a circulation menu.
[NB: If you find that you are frequently changing the expiry date at this point in placing a hold, it may be advisable to change the rules which determine the default expiry date in fields 11 and 12 in the relevant hold code in the table CHC (see Circulation Set Up Manual, 4.6-7)].

b) Changing the activation date

In very exceptional circumstances it may be desirable to place a hold which is not effective until some time in the future. In these circumstances, follow steps 1 to 5 from the above guidelines (7.3-6) for placing a title reservation, then proceed as follows:

Step 6

From the Hold Detail screen, select the **Activation info** option and press **<Return>**. The cursor will appear in the *Active:* field.

Step 7

Type in the date from which you wish the hold to be filled by any item which is checked in within its hold scope. This date can be entered in the formats DD.MM.YY, DD/MM/YY, or DD-MM-YY, etc., as well as formats including a four-digit year, but will appear in the format 12 JUN 1999 (it is not necessary to enter the year if the expiry date falls in the current calendar year). Then press **<Return>**.

Step 8

The cursor will then appear in the field for activation time. By default this will appear as the current time. Type in a new time in twenty-four-hour time in the format HHMM or HH:MM (or, e.g., **9** for 9:00 a.m.), or press **<Return>** to accept the default.

Step 9

The cursor will go back to the option bar. You may change any other conditions of the hold desired, or you may select the **Commit reservation** option and press **<Return>**. If the hold is successfully placed, you will be taken back to the Holds Processing screen, and may press **<Return>** twice more to go back to a circulation menu.

Changing the conditions of a hold after it has been placed

Once a hold has been placed it is possible to go back to at a later stage to change the attached conditions (e.g., widen the scope or extend the expiry date, etc.). Use the following guidelines to retrieve an existing hold:

Step 1

Type (or select the option for) **hrt** from any menu in the circulation module. The *Holds Processing* screen will appear.

Step 2

At the prompt:

Enter Patron Name or Barcode:

wand in the borrower's barcode, or type in their name in the format *surname, first name* (e.g., **peatl**, or **peatling g**) and press **<Return>**. If you have entered a name, a browse list of reader's names alphabetically closest to your search term will display. Locate the correct borrower, type the line number and press **<Return>**. (**NB**: Blocks against the borrower's name may display at this point. If the blocks screen does appear, select **Exit** and press **<Return>** to continue editing the hold.)

A screen similar to the following will then appear:

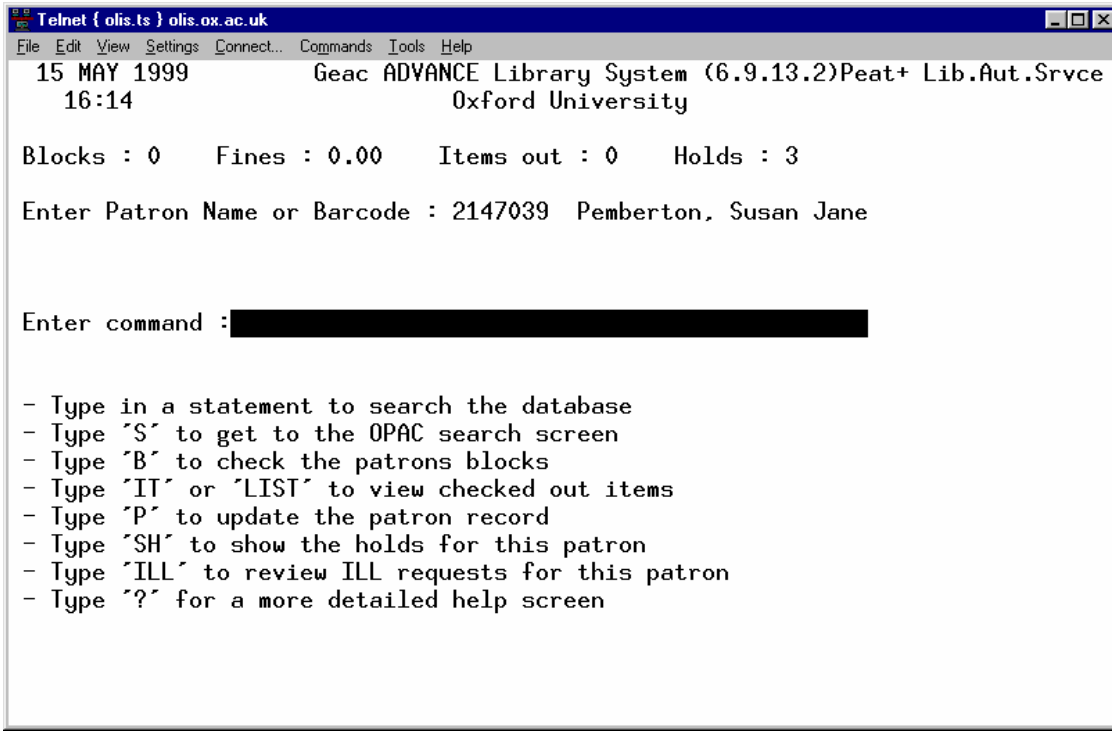

Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
15 MAY 1999 Geac ADVANCE Library System (6.9.13.2)Peat+ Lib.Aut.Srvce
16:14 Oxford University
Blocks : 0 Fines : 0.00 Items out : 0 Holds : 3
Enter Patron Name or Barcode : 2147039 Pemberton, Susan Jane
Enter command :
- Type in a statement to search the database
- Type 'S' to get to the OPAC search screen
- Type 'B' to check the patrons blocks
- Type 'IT' or 'LIST' to view checked out items
- Type 'P' to update the patron record
- Type 'SH' to show the holds for this patron
- Type 'ILL' to review ILL requests for this patron
- Type '?' for a more detailed help screen

Fig. 7.7: Holds Processing screen

[NB: If you are at the checkout screen with the borrower for whom you wish to edit a hold retrieved, it is possible to go straight to this screen by typing **h** at the item prompt and pressing **<Return>.**]

As listed on this screen, the command **p** can be entered at the prompt to access the borrower record, the command **it** to access the reader's list of items currently out on loan, the command **s** to search the catalogue to retrieve an item to reserve for the reader (see above, 7.3-12), or the command **b** to access their blocks screen.

Step 3

At the prompt:

Enter command :

type **sh** and press **<Return>**. The *Holds by Patron* screen will appear:

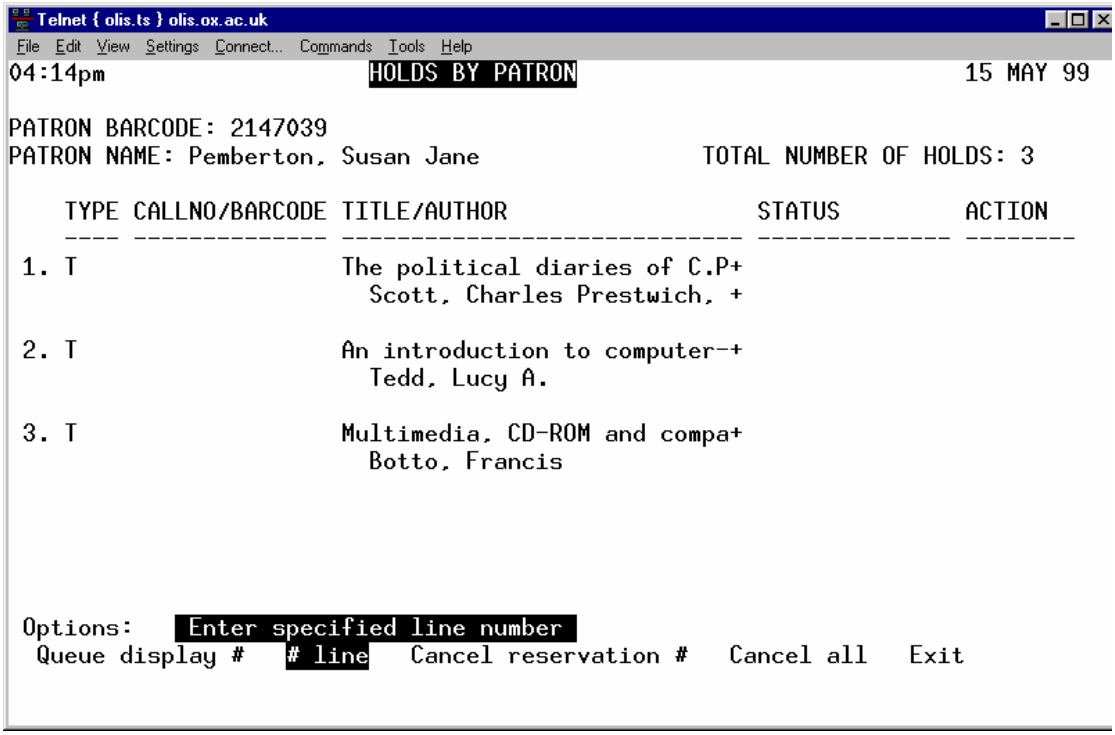

Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
04:14pm HOLDS BY PATRON 15 MAY 99
PATRON BARCODE: 2147039
PATRON NAME: Pemberton, Susan Jane TOTAL NUMBER OF HOLDS: 3
TYPE CALLNO/BARCODE TITLE/AUTHOR STATUS ACTION
1. T The political diaries of C.P+
Scott, Charles Prestwich, +
2. T An introduction to computer-+
Tedd, Lucy A.
3. T Multimedia, CD-ROM and compa+
Botto, Francis
Options: Enter specified line number
Queue display # # line Cancel reservation # Cancel all Exit

Fig. 7.8: Holds by Patron screen

Step 4

Locate the hold you wish to edit (select **Forward** and press **<Return>** if it is not on the first screen). Then select the **# line** option, type the line number of the hold you wish to edit and press **<Return>**. The *Hold Detail* screen for this hold will appear.

Step 5

From this screen it is possible to change the conditions of the hold in any of the ways described on pages 7.7-12 above. For instance, you can extend the expiry date of the hold by selecting the **Date** option, or change a title reservation to a copy reservation by selecting the **Copy reservation** option. Once you have finished making any changes to the conditions of the hold, select the **Commit reservation** option to reapply the hold and press **<Return>**. If your changes are successful, you will be taken back to the Holds Processing screen. Press **<Return>** twice to go back to a circulation menu.

Hold Queue Display

If you wish to see whether there are any outstanding holds for an item (for instance to give a reader an indication of how long they would have to wait for an item), you may either

- Locate the item on a *Holds by Patron* screen (Fig. 7.8 above), select the option **Queue display #**, type the line number and press **<Return>**, or
- Select the option for or type **chq** from any menu in the circulation module and press **<Return>**. At the prompt:

Enter search command :

You may type any search command, e.g., **t=political diaries**, to retrieve the item for which you wish to display the list of current holds. (See the OPAC staff pocket reference guides in leaflet form, or the OPAC reader pocket reference guides in leaflet form or at http://www.lib.ox.ac.uk/olis/ for hints on further searching techniques). From the Detailed Display screen for the item in which you are interested, select the **Retrieve** option and press **<Return>**. Any outstanding holds will be displayed in a screen similar to the following:

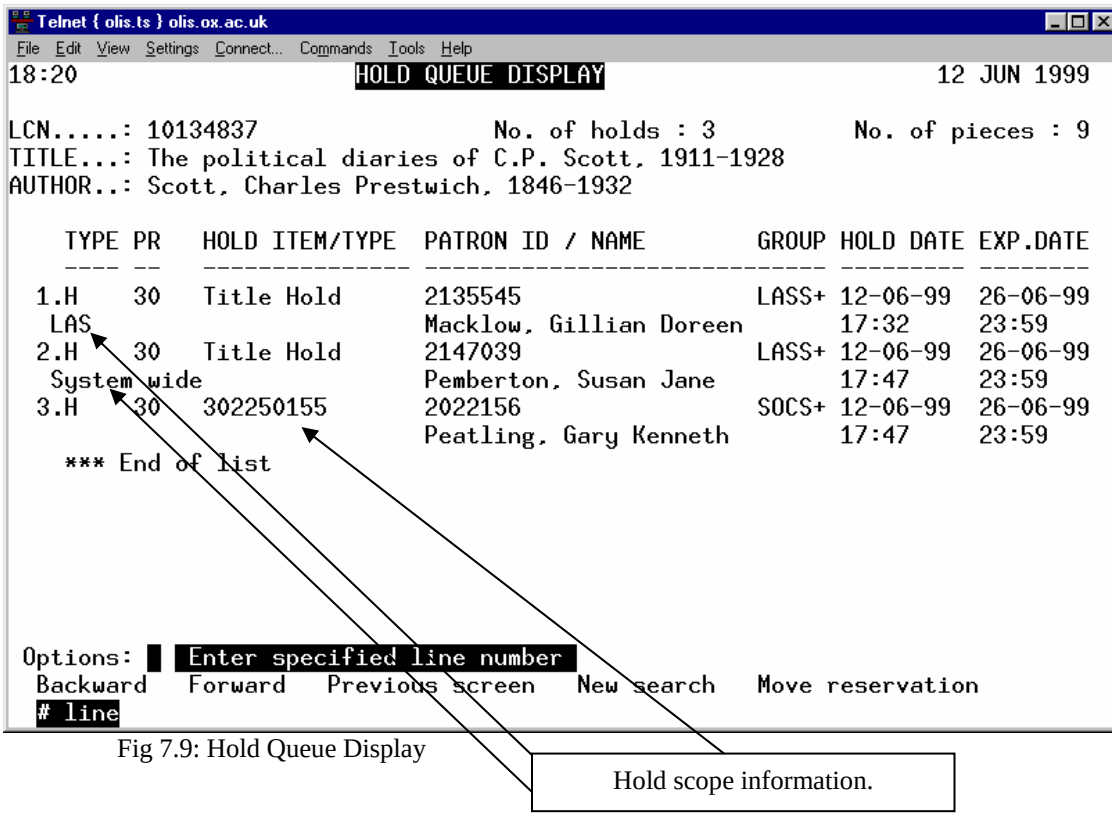

Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
18:20 HOLD QUEUE DISPLAY 12 JUN 1999
LCN.....: 10134837 No. of holds : 3 No. of pieces : 9
TITLE...: The political diaries of C.P. Scott, 1911-1928
AUTHOR..: Scott, Charles Prestwich, 1846-1932
TYPE PR HOLD ITEM/TYPE PATRON ID / NAME GROUP HOLD DATE EXP.DATE
1.H 30 Title Hold 2135545 LASS+ 12-06-99 26-06-99
LAS Macklow, Gillian Doreen 17:32 23:59
2.H 30 Title Hold 2147039 LASS+ 12-06-99 26-06-99
System wide Pemberton, Susan Jane 17:47 23:59
3.H 30 302250155 2022156 SOCS+ 12-06-99 26-06-99
Peatling, Gary Kenneth 17:47 23:59
*** End of list
Options: Enter specified line number
Backward Forward Previous screen New search Move reservation
line
Hold scope information.

Fig 7.9: Hold Queue Display

(Note that the format of this screen will be a little different if you access it using the **Queue display #** option). Holds are listed in the order in which they were placed. The scope of each title hold is indicated on the second line of the *TYPE* column for each hold: if your library's three-letter code, copies at your library will fall within the scope of the hold. If *System wide* appears here, copies at your library will fall within the scope of the hold *if* the reader has borrowing permissions at your library. If an item barcode, rather than *Title Hold*, appears in the *HOLD ITEM/TYPE* column, however, this indicates that the hold is a copy hold (as with the hold on line three in Fig. 7.9). The display in the *GROUP* column does *not* indicate the scope of a hold. By default the first hold in the queue will be satisfied by the next copy to be returned at your library, *so long as* the returned copy falls within the hold scope.

[NB: If you access a hold queue through CHQ like this, an option **Move reservation** will appear which if selected will enable you to move a particular reservation up or down the list of holds. This should rarely be necessary, however, and we strongly recommend that it is not done unless *absolutely* necessary.]

Readers themselves can see *brief* details (i.e., not including readers' names or barcode numbers) of current reservations for an item before placing a hold on it over the

OPAC: see the third OPAC reader pocket reference guide in leaflet form or at http://www.lib.ox.ac.uk/olis/rpr3/index.htm

Error messages

Please contact LAS if the following message appears while you are placing a hold for a reader:

```
Incorrect setting for the default scope - please report this.
Press <RETURN> to continue
```

The following message displays in the course of placing a hold if the default expiry date entered in field 12 of the relevant hold code in CHC is set to a date in the past:

```
Default Hold expiry date parameter set to date prior to today !!!!
```

This will not prevent you from placing the current hold, but you are strongly advised in these circumstances to alter this field in your library's set up as soon as possible if this message appears, as otherwise the placing of further holds will be unnecessarily inconvenienced. See Circulation Set Up Manual 4.6-7 on how to change this field.

Reservations by readers

Readers may also place holds themselves via the OPAC or GeoWeb. However, they have far less control over the variables which staff can alter in placing a reservation on behalf of a reader. Readers may:

- reduce (but not expand) the expiry period of a hold placed over the OPAC,
- define the scope of the hold (over the OPAC) or the pickup location (over GeoWeb) as a single library. In practice the effect is identical, since it specifies that the hold can be filled by any copy of the chosen title at the selected library - the reader is unable to specify either that the hold can only be filled by a particular copy of a title, or that it can be satisfied by any copy of the title at more than one library.

If a reader wishes to place a hold which requires other hold conditions besides these, you are advised to place it for them through the staff screens.

See the third OPAC reader pocket reference guide in leaflet form or at http://www.lib.ox.ac.uk/olis/rpr3/index.htm for details of how readers can place holds over the OPAC.

Cancelling holds

If it is necessary to cancel unfilled holds (i.e., holds for which the item has not been returned before the reader decides that they no longer want the item) you may cancel holds individually or cancel *all* holds on any one borrower's record. NB: There is a different procedure for cancelling holds which are filled (i.e., where a copy is returned to the library before the reader decides that they no longer want the item) - see below 7.20-1.

Cancel reservation #

Step 1

Type (or select the option for) **hrt** from any menu in the circulation module. The *Holds Processing* screen will appear.

Step 2

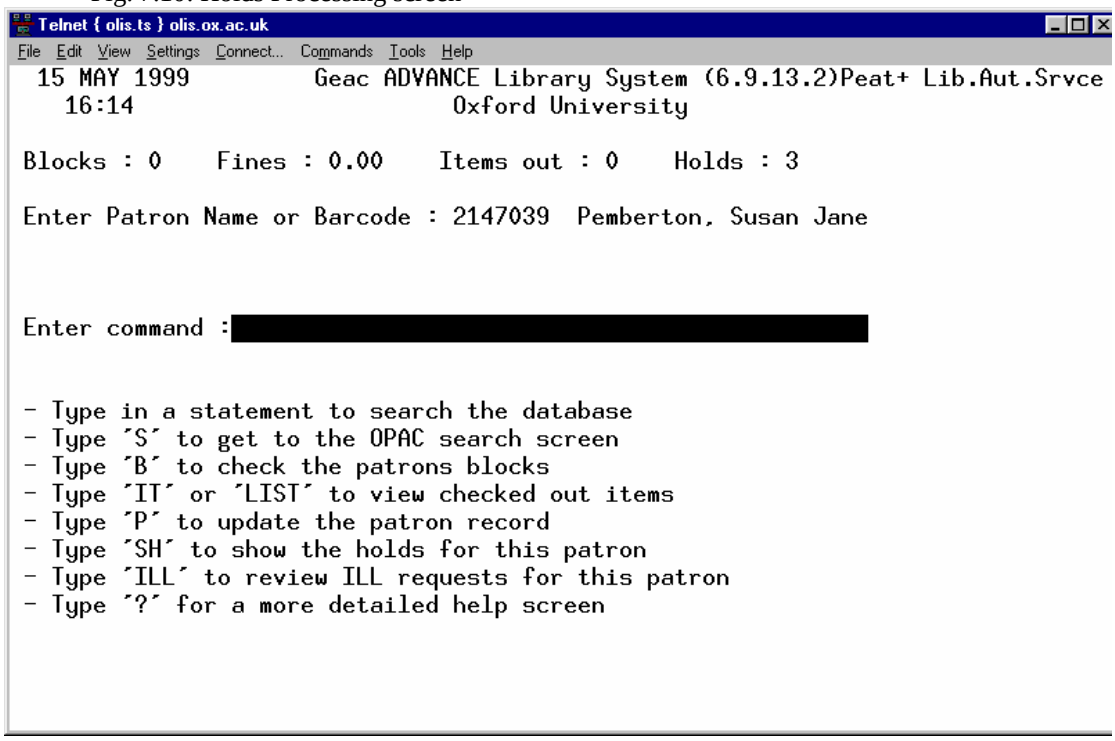
At the prompt:

Enter Patron Name or Barcode:

wand in the borrower's barcode, or type in their name in the format *surname, first name* (e.g., **peatl**, or **peatling g**) and press **<Return>**. If you have entered a name, a browse list of reader's names alphabetically closest to your search term will display. Locate the correct borrower, type the line number and press **<Return>**. (**NB**: Blocks against the borrower's name may display at this point. If the blocks screen does appear, select **Exit** and press **<Return>** to continue with placing the hold.)

A screen similar to the following will appear:

Fig. 7.10: Holds Processing screen


Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
15 MAY 1999 Geac ADVANCE Library System (6.9.13.2)Peat+ Lib.Aut.Srvce
16:14 Oxford University
Blocks : 0 Fines : 0.00 Items out : 0 Holds : 3
Enter Patron Name or Barcode : 2147039 Pemberton, Susan Jane
Enter command :
- Type in a statement to search the database
- Type 'S' to get to the OPAC search screen
- Type 'B' to check the patrons blocks
- Type 'IT' or 'LIST' to view checked out items
- Type 'P' to update the patron record
- Type 'SH' to show the holds for this patron
- Type 'ILL' to review ILL requests for this patron
- Type '?' for a more detailed help screen

[NB: If you are at the checkout screen with the borrower for whom you wish to cancel a hold retrieved, it is possible to go straight to this screen by typing **h** at the item prompt and pressing **<Return>**].

As listed on this screen, the command **p** can be entered at this point to access the borrower record, the command **it** to access the reader's list of items currently out on loan, the command **s** to search the catalogue to retrieve an item to reserve for the reader (see above, 7.3-12), or the command **b** to access their blocks screen.

Step 3

At the prompt:

Enter command :

type **sh** and press **<Return>**. The *Holds by Patron* screen will appear:

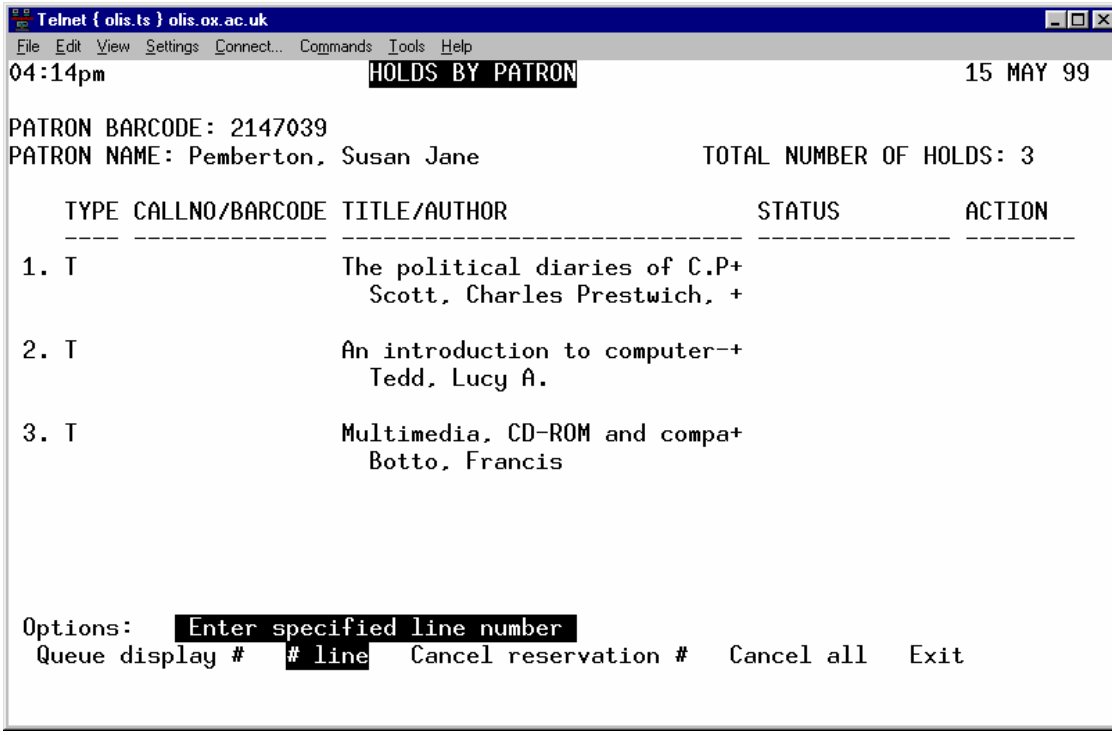

Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
04:14pm HOLDS BY PATRON 15 MAY 99
PATRON BARCODE: 2147039
PATRON NAME: Pemberton, Susan Jane TOTAL NUMBER OF HOLDS: 3
TYPE CALLNO/BARCODE TITLE/AUTHOR STATUS ACTION
1. T The political diaries of C.P+
Scott, Charles Prestwich, +
2. T An introduction to computer-+
Tedd, Lucy A.
3. T Multimedia, CD-ROM and compa+
Botto, Francis
Options: Enter specified line number
Queue display # # line Cancel reservation # Cancel all Exit

Fig. 7.11: Holds by Patron screen

Step 4

Locate the hold you wish to cancel (select the **Forward** option and press **<Return>** if it does not appear on this first screen). Then select the **Cancel reservation #** option, type the line number of the hold you wish to cancel, and press **<Return>**. A message similar to the following will appear:

Are you sure you want to CANCEL hold for patron 2147039 (Y/N)?

Type **y** and press **<Return>**. An editing window will then appear in which it is possible to add a note on why the hold has been cancelled (see Fig. 7.12 overleaf). However, it is more likely that you will simply wish to press the **Escape** key and then type **e** to exit this window.

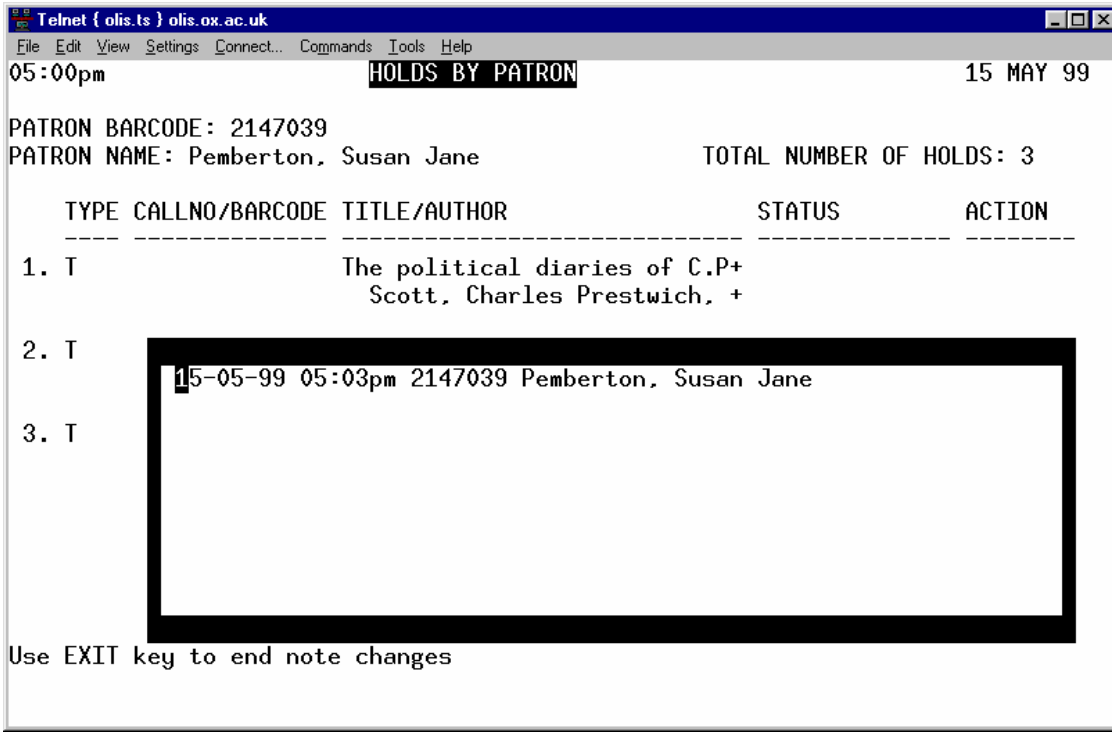

Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
05:00pm HOLDS BY PATRON 15 MAY 99
PATRON BARCODE: 2147039
PATRON NAME: Pemberton, Susan Jane TOTAL NUMBER OF HOLDS: 3
TYPE CALLNO/BARCODE TITLE/AUTHOR STATUS ACTION
1. T The political diaries of C.P+
Scott, Charles Prestwich, +
2. T
15-05-99 05:03pm 2147039 Pemberton, Susan Jane
3. T
Use EXIT key to end note changes

Fig. 7.12: Hold cancellation note window

The following prompt will then appear:

Do you want to save changes to note (Y/N/E = Edit)?

Type **y** and press **<Return>** to save any changes, or type **n** and press **<Return>** to leave the note blank. You are returned to the *Holds by Patron* screen. The status *Cancelled* will display next to the reservation which you have cancelled:

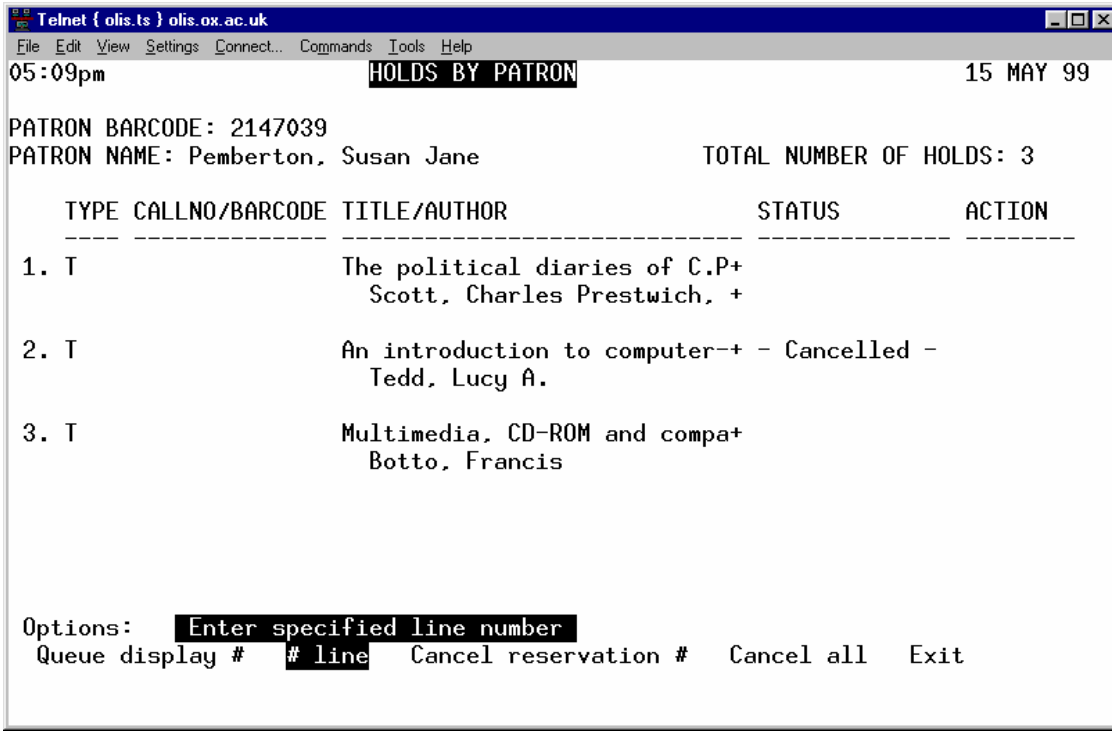

Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
05:09pm HOLDS BY PATRON 15 MAY 99
PATRON BARCODE: 2147039
PATRON NAME: Pemberton, Susan Jane TOTAL NUMBER OF HOLDS: 3
TYPE CALLNO/BARCODE TITLE/AUTHOR STATUS ACTION
1. T The political diaries of C.P+
Scott, Charles Prestwich, +
2. T An introduction to computer-+ - Cancelled -
Tedd, Lucy A.
3. T Multimedia, CD-ROM and compa+
Botto, Francis
Options: Enter specified line number
Queue display # # line Cancel reservation # Cancel all Exit

Fig 7.13: Cancelled hold status (line 2) on a Holds by Patron screen

Any reservations which are cancelled, have expired or have been collected will only appear in a reader's *Holds by Patron* list until a nightly processing job removes them. Select **Exit** and press **<Return>** to go back to the Holds Processing screen, from where you may press **<Return>** twice to go back to a circulation menu.

Cancel all

Should you wish to cancel all of the outstanding reservations for a reader, follow steps 1 to 3 in the procedure for cancelling a single reservation described above (7.17-8). Instead of step 4, select the option **Cancel all** and press **<Return>**. The following message will appear:

Are you sure you want to cancel all holds for this patron ? (Y/N)

Type **y** and press **<Return>**. An editing window will then appear in which it is possible to add a note on why the holds have been cancelled. However, it is more likely that you will simply wish to press the **Escape** key and then type **e** to exit the window. The following prompt will then appear:

Do you want to save changes to note (Y/N/E = Edit)?

Type **y** and press **<Return>** to save any changes, or type **n** and press **<Return>** to leave the note blank. You will be returned to the *Holds by Patron* screen and the status *Cancelled* will be displayed next to all the item reservations.

Any reservations which are cancelled, have expired or have been collected will only appear in a reader's *Holds by Patron* list until a nightly processing job removes them. Select **Exit** and press **<Return>** to go back to the Holds Processing screen, from where you may press **<Return>** twice to go back to a circulation menu.

Cancel at Check in

It will not be possible to cancel a hold in this way if it is filled and there is an item awaiting the reader's collection before they realise that they no longer require it. In these circumstances, the hold can be cancelled, and the item made available to other readers, by using the following guidelines:

Step 1

From any menu in the circulation module, select the option for or type **cin** and press **<Return>**.

Step 2

Wand in the barcode of the item for which you wish to cancel a hold. A message similar to the following will appear.

```
This item 302250154 on hold shelf until 16 MAY 99 17:42
Enter Y to remove item from hold shelf, or N to leave
```

Type **y** and press **<Return>** to make the item available for other readers.

Step 3

The following prompt will then appear:

```
Cancel the hold (Y) or replace it (N) ?
```

Type **y** and press **<Return>** to cancel the hold altogether.
[NB: Typing **n** and pressing **<Return>** at this prompt will make the item available to the next reader, but will replace the hold: the item will thus again be captured for the reader for whom it was awaiting collection when it is next checked in. You should *very rarely* need to use this option.]

If the following prompt then appears:

```
This Item 3xxxxxxxx is not checked out
```

The item status is now *Available* and you may return it to general circulation. However, if the following prompt appears:

```
Allow this item to satisfy other holds (Y/N) ?
```

This indicates that there is/are (a) further hold(s) for the item. Type **y** and press **<Return>** at this point if you wish to display the name of the next reader in the hold queue, and to leave the item on your hold shelf for their collection.

Typing **n** and pressing **<Return>** at this prompt will change the item status to *Available* and you may return the item to general circulation; but it will **not** cancel the other hold(s) for the item, and the first of any such further holds still on the system will be filled the next time the item is checked in. If you wish to cancel (the) further

hold(s) for the item at this point, you should instead type **y** at this prompt and press **<Return>**. Then please go back to step 2 above.

Once you have finished cancelling holds at check in, press **<Return>** at the checkin item prompt to go back to a circulation menu.

Cancellation of holds by readers

It is possible for readers to cancel their own unfilled holds via the OPAC or GeoWeb. See the third OPAC reader pocket reference guide in leaflet form or at http://www.lib.ox.ac.uk/olis/rpr3/index.htm for details of how readers can cancel holds over the OPAC. However, it is not possible for readers to cancel a hold themselves when it has been filled and there is an item waiting for them to collect: this must be done through staff.

Lapsed holds

When an item which has been reserved by another reader is returned to your library, we suggest that you make a note of the name of the reader for/by whom the reservation was placed and of the date when the hold was filled, and place the item on your reserves shelf (see above, 5.17). Depending on your library's setup (see Circulation Setup Manual, 4.5), a notice for the reader for/by whom the reservation was placed should be generated the next time the notice production job is run (which will be the following morning).

Each item that is awaiting collection on your library's hold shelf must be collected within a certain period or the hold will *lapse*. In each case this period lasts from your library's closing hour on the day when the hold is filled until the period specified in field 4 of your library's relevant hold code in the table CHC has elapsed (see Circulation Setup Manual 4.4-5). It is advisable to check your hold shelf each day and to remove any filled holds which have lapsed. Such items for which the holds have lapsed should be wanded in at the checkin screen just as cancelled holds are (see 7.21-2 above). This will make the item available, either for the next reader in the hold queue (whose name will be displayed in the checkin screen) to collect, or for general circulation.

If you have no record of the date when the hold on an item awaiting collection is due to lapse, use the following guidelines.

Step 1

Select the option for or type **chq** from any menu in the circulation module and press **<Return>**.

Step 2

At the prompt:

Enter search command :

Wand in the barcode of the current item.

Step 3

A screen similar to the following will appear:

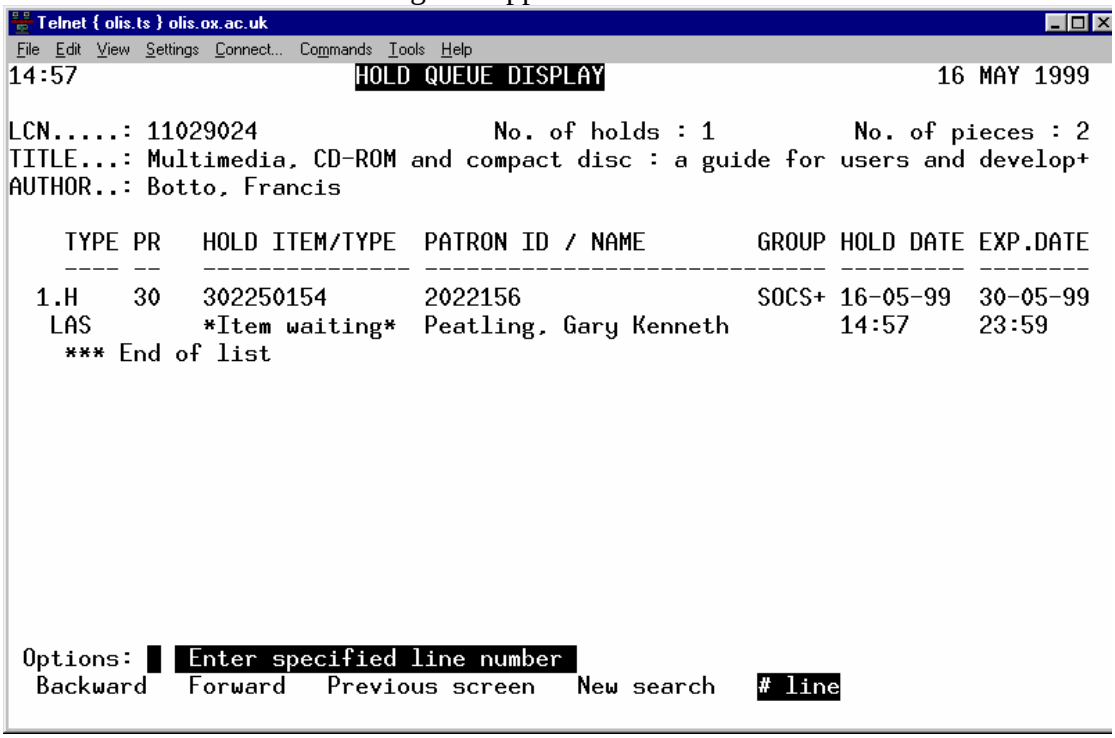

Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
14:57 HOLD QUEUE DISPLAY 16 MAY 1999
LCN.....: 11029024 No. of holds : 1 No. of pieces : 2
TITLE...: Multimedia, CD-ROM and compact disc : a guide for users and develop+
AUTHOR..: Botto, Francis
TYPE PR HOLD ITEM/TYPE PATRON ID / NAME GROUP HOLD DATE EXP.DATE
1.H 30 302250154 2022156 SOCS+ 16-05-99 30-05-99
LAS *Item waiting* Peatling, Gary Kenneth 14:57 23:59
*** End of list
Options: Enter specified line number
Backward Forward Previous screen New search # line

Fig. 7.14: Hold Queue Display with # line option selected

Locate the hold with the message ***Item waiting*** displaying in the *HOLD ITEM/TYPE* column (NB: this will almost always be the first hold in the queue, but will not necessarily be the only hold in the queue). Then select the **# line** option, type in the line number of the hold, and press **<Return>**.

Step 4

A Hold Detail screen similar to the following will appear:

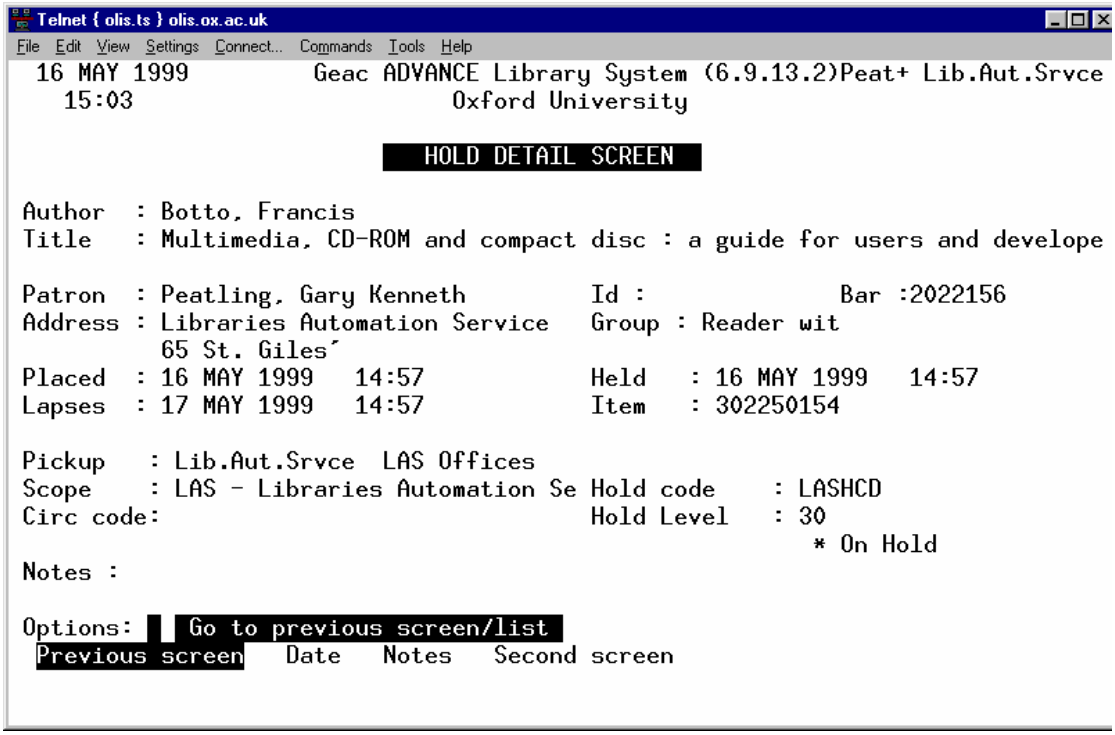

Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
16 MAY 1999 Geac ADVANCE Library System (6.9.13.2)Peat+ Lib.Aut.Srvce
15:03 Oxford University
HOLD DETAIL SCREEN
Author : Botto, Francis
Title : Multimedia, CD-ROM and compact disc : a guide for users and develope
Patron : Peatling, Gary Kenneth Id : Bar :2022156
Address : Libraries Automation Service Group : Reader wit
65 St. Giles'
Placed : 16 MAY 1999 14:57 Held : 16 MAY 1999 14:57
Lapses : 17 MAY 1999 14:57 Item : 302250154
Pickup : Lib.Aut.Srvce LAS Offices
Scope : LAS - Libraries Automation Se Hold code : LASHCD
Circ code: Hold Level : 30
* On Hold
Notes :
Options: Go to previous screen/list
Previous screen Date Notes Second screen

Fig. 7.15: Hold Detail screen

The date at which the hold is due to lapse will appear in the *Lapses:* field (in most cases you will not need to be concerned about the time which displays in this field).

[NB: by selecting the **Date** option in this screen and pressing **<Return>**, it is possible to access this *Lapses:* field and type in a new date (and time) at which the hold should lapse. One might very occasionally wish to do this, for instance, if a reader is unable to come into the library to collect an item awaiting their collection due to special circumstances. Select the option **Commit reservation** and press **<Return>** to make this changed condition effective.]

Step 5

Select the option **Previous screen** and press **<Return>** to go back to the *Hold Queue Display* screen. Select the option **Previous screen** and press **<Return>** again, and then press **<Return>** once more to go back to a circulation menu.

Message alerting staff to a hold on an item at Check in

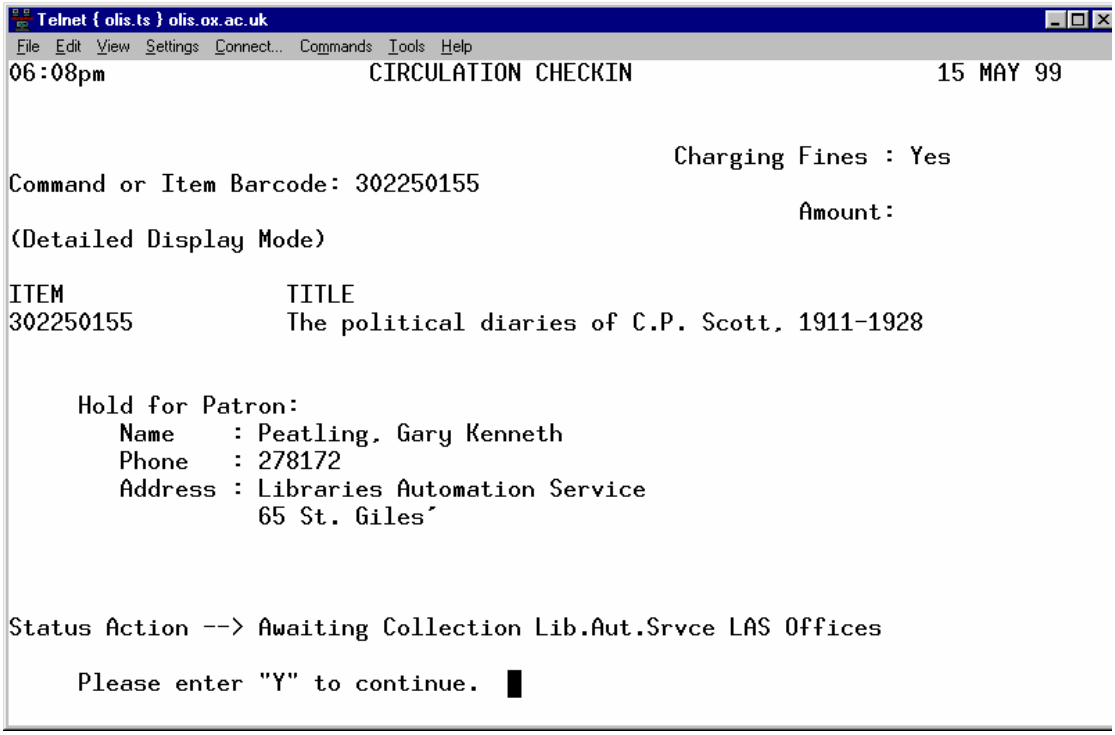

Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
06:08pm CIRCULATION CHECKIN 15 MAY 99
Charging Fines : Yes
Command or Item Barcode: 302250155
Amount:
(Detailed Display Mode)
ITEM TITLE
302250155 The political diaries of C.P. Scott, 1911-1928
Hold for Patron:
Name : Peatling, Gary Kenneth
Phone : 278172
Address : Libraries Automation Service
65 St. Giles'
Status Action --> Awaiting Collection Lib.Aut.Srvce LAS Offices
Please enter "Y" to continue.

Fig. 7.16: Hold message at Checkin

Message at Check out indicating that a reader is collecting an item they had reserved

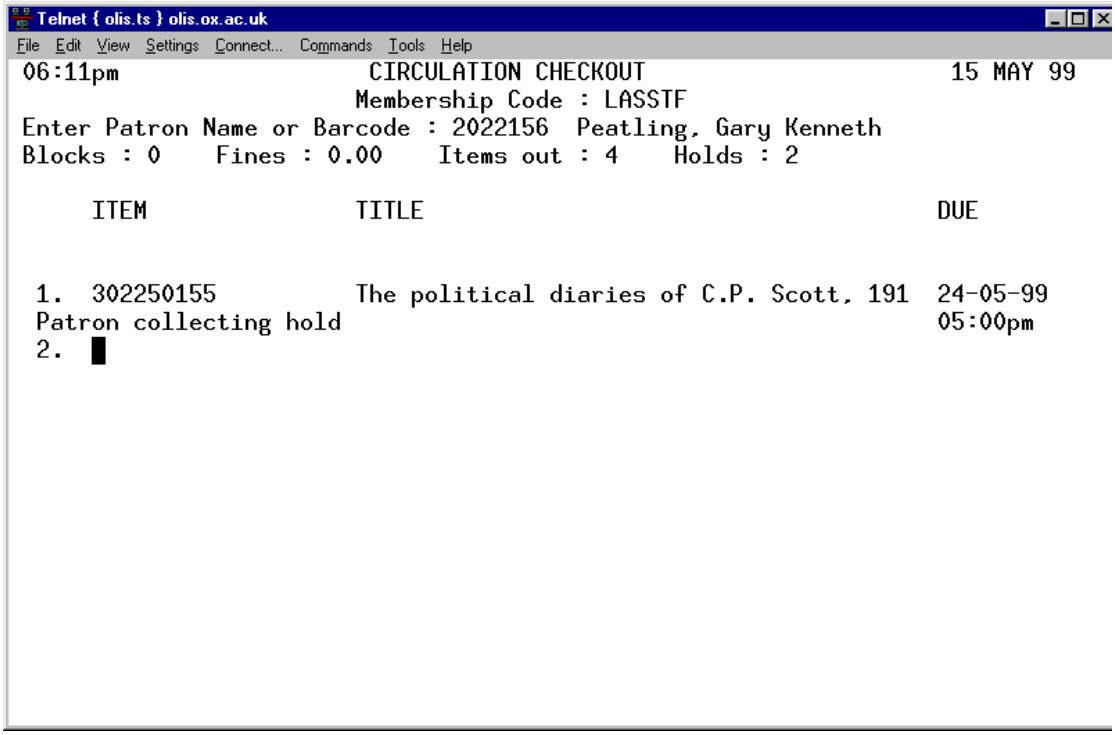

Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
06:11pm CIRCULATION CHECKOUT 15 MAY 99
Membership Code : LASSTF
Enter Patron Name or Barcode : 2022156 Peatling, Gary Kenneth
Blocks : 0 Fines : 0.00 Items out : 4 Holds : 2
ITEM TITLE DUE
1. 302250155 The political diaries of C.P. Scott, 191 24-05-99
Patron collecting hold 05:00pm
2.

Fig. 7.17: Checkout screen “Patron collecting hold” message

Two other messages referring to holds may appear at check out:

- If the following message displays as an item is checked out

```
This Item satisfies patron hold without capture to hold shelf
Press any key to continue
```

This indicates that a reservation with a system-wide scope has been placed for the reader to whom this item has been checked out on this title at another library. The item you have checked out to them has thus satisfied the hold without the reader needing to borrow an item from the library which placed the hold. When this message appears, just press **<Return>**, and a due date and time for the loan will be calculated as usual.

- If a message similar to the following appears as you check an item out to a reader

```
Another item is held for this borrower.
Pickup location is Lib.Aut.Srvce LAS Offices
Do you wish to cancel this hold/booking (Y/N) ?
```

This indicates that a copy of the same title is awaiting collection by the reader at another library of which they are a member. It will usually be appropriate for the other library to cancel the reader's hold for its item in these circumstances, but there may be cases in which the reader will still want the item at the other library held for them (an example might be where this is a different issue or volume number from the item they are currently checking out at your library). We advise therefore that you type **n** and press **<Return>**, at this prompt, and then liase with the reader and the library mentioned in the message to advise them that they may wish to cancel the hold against their item.

Recalls

Recalls may be placed on item(s) which are needed by readers other than their current borrowers, or on item(s) required for library purposes such as repair or course reserve. They may generate a notice which may be sent by email or printed to notify the current borrower that the item is required by another reader (see Circulation Set Up Manual, 2.12-4 on how to set up the wording of such notices, and 2a.3-10, especially 2a.9-10, on how to control the timing and contact method of such notices). The due date of a recalled item may also be changed either according to a set of rules attached to the relevant recall code (see Circulation Set Up Manual, 3.5-8), or to a date specified at the moment of recalling a particular item (see 7.28-30 below).

At the moment all recalls require manual intervention on the system: there is no system of triggering the automatic production of recall notices when an item is reserved over the OPAC (or GeoWeb), though this feature is under investigation. OLIS offers two methods for placing a recall:

- Directly invoke a recall on an item using the **CREL** function. This means that if you wish to recall the item for a specific reader, it will be necessary also to reserve that item for the reader (see 7.3-9 above) so that staff will be alerted when the item is checked in.
- Invoke a recall while placing a hold on an item (see below 7.30-1).

In placing a recall, it is necessary to specify an individual copy to be recalled. If you are placing a recall through CREL, you *must* know the barcode of the item you are recalling: this can be displayed either through using the **# item** option on the item list of the current borrower (see above 4.7-8), or by searching the catalogue. Type **search** at any menu in the circulation module and press **<Return>** to bring up a staff search screen, or select the option for or type **ceh** and press **<Return>** from any menu in the circulation module, and then enter a search command (see appendix B on the option **ceh**: see the OPAC staff pocket reference guides, available from LAS in leaflet form, or the OPAC reader pocket reference guides in leaflet form or at http://www.lib.ox.ac.uk/olis/). You will then be able to display the item piece record using the **# item** option from the Detailed Display screen. If you are recalling an item indirectly while placing a reservation, this means that it will be necessary to place a copy rather than a title hold.

We recommend the option of placing recalls through CREL as this will provide a clearer display of the resulting due date and time for a recalled item.

Please note that it is not possible to place a recall on an item unless it is currently checked out.

Recall through CREL

Step 1

Type or select the option for **crel** and press **<Return>** at any menu in the circulation module. A screen similar to the following will appear:

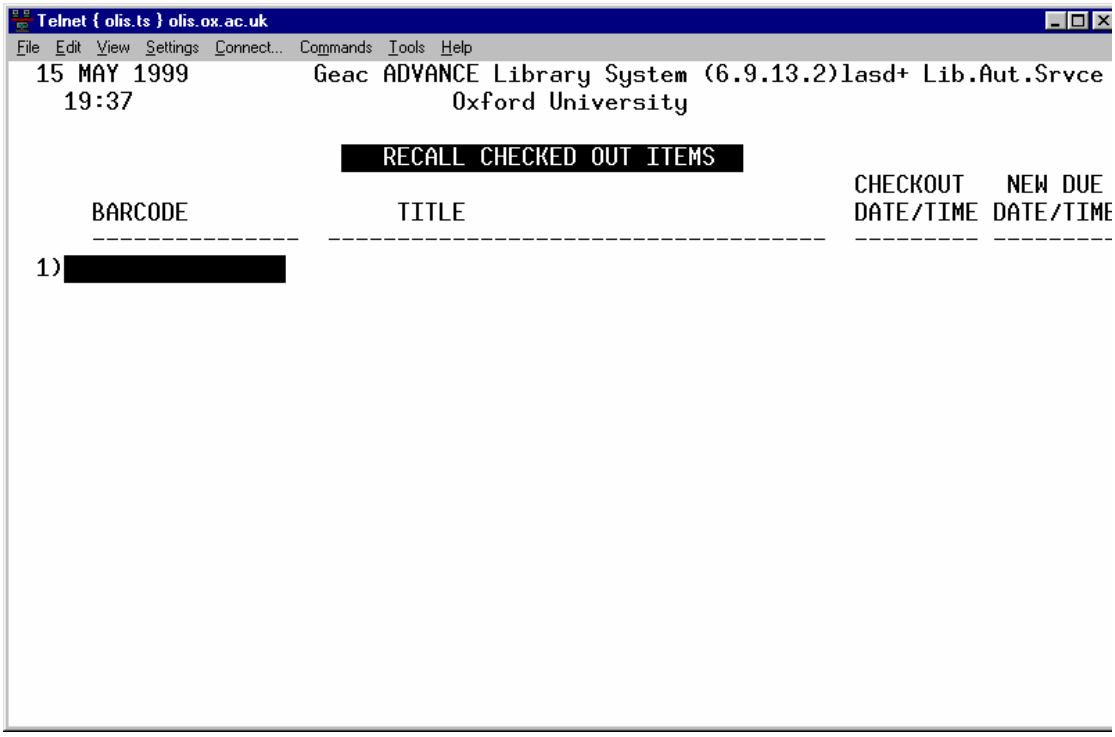

Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
15 MAY 1999 Geac ADVANCE Library System (6.9.13.2)lasd+ Lib.Aut.Srvce
19:37 Oxford University
RECALL CHECKED OUT ITEMS
BARCODE TITLE CHECKOUT DATE/TIME NEW DUE DATE/TIME
1)

Fig. 7.18: Blank Recall Checked out Items screen

Step 2

Type in the barcode number of the item to be recalled and press **<Return>**. A screen similar to the following will appear:

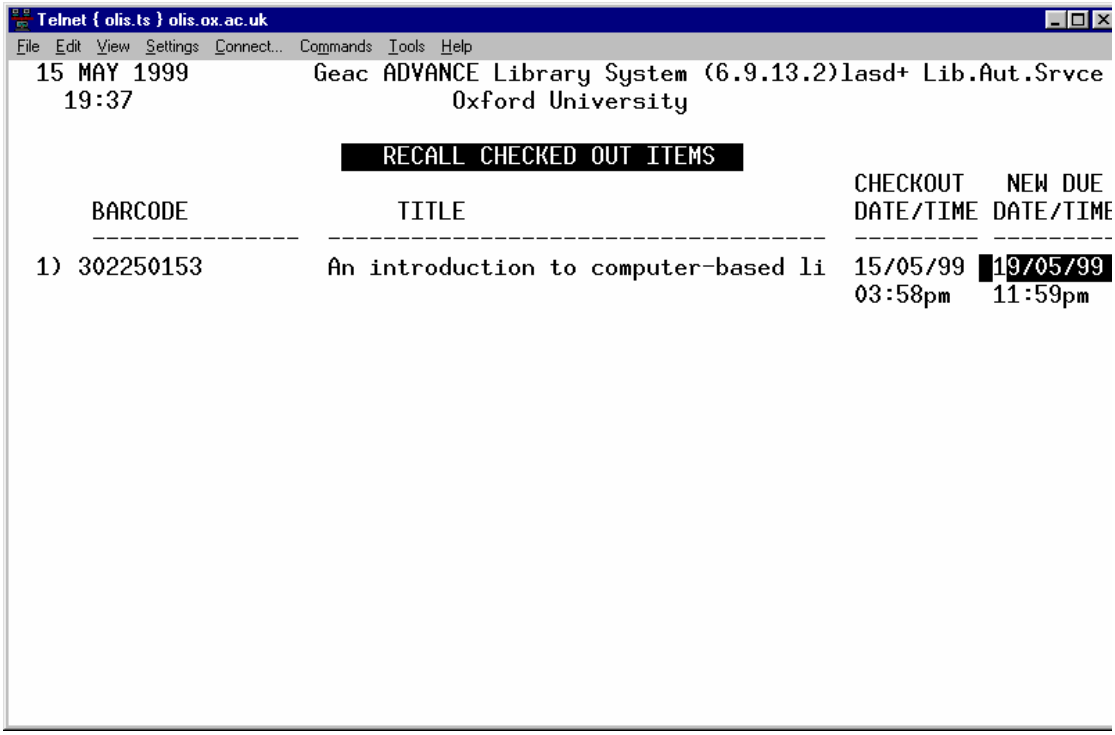

Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
15 MAY 1999 Geac ADVANCE Library System (6.9.13.2)lasd+ Lib.Aut.Srvce
19:37 Oxford University
RECALL CHECKED OUT ITEMS
BARCODE TITLE CHECKOUT DATE/TIME NEW DUE DATE/TIME
1) 302250153 An introduction to computer-based li 15/05/99 03:58pm 19/05/99 11:59pm

Fig. 7.19: CREL screen with cursor in Date field

Step 3

The barcode and title of the item, and the current checkout date/time of the current loan will be displayed. The default due date/time for the item after it has been recalled will be displayed in the *New Due Date/Time* column. The cursor will appear in the date field as shown in Fig 7.19. This default date/time will be determined by the parameters of the recall code linked to the patron membership/circulation code combination in the current loan (see Circulation Setup Manual, 8.22, 3.5-8), and, depending on this set up, may automatically change the due date/time for the current loan.

Step 4

If you are happy to accept this default due date/time, press **<Return>** twice and the recall will be placed.

[NB: In certain circumstances depending on your library's set up, the default due date/time displayed here may be further into the future than the due date had no recall been placed. In these circumstances, it is possible to replace this default with a closer due date/time - if the default is accepted, although no error message is displayed, the item will **not** be recalled and **no** notice will be generated.]

If you wish to use a due date/time different from the default and *earlier* than the original due date before the recall was placed, you may type such a date over the default (the formats DD.MM.YY, DD-MM-YY, or 30 SEP 99, will all be accepted at this point, but the entered date will be displayed in the format DD/MM/YY). Then press **<Return>**.

[NB: If your library is closed on the date you enter according to its circulation calendar, the following message will display as you press **<Return>**:

Library closed on 29/05/99. Moving to next open date.

The next library open date will then appear in the field for due date.]

The cursor will then drop down to the time field and your library's closed hour on the date you have entered will display. Press **<Return>** to accept the default, or type a new time in the field in the twenty-four-hour format HHMM or HH:MM (you *may* wish to type in a different time if you are recalling an item usually lent for very short periods, i.e., hourly loans rather than days). Then press **<Return>**.

Step 5

The cursor will appear at the second item prompt. Type in the barcode of a further item which you wish to recall, or press **<Return>** to go back to a circulation menu.

The item will now be recalled and a recall notice generated. The item status will appear as *Recalled* on the OPAC and in the readers item list.

Indirect recall

To recall an item indirectly (i.e., while placing a copy hold), use the guidelines above for retrieving and placing a reservation (Steps 1 to 5 on 7.3-6). However, select the option **Copy reservation** from the *Hold Detai*l screen and press **<Return>**. A screen similar to the following will appear:

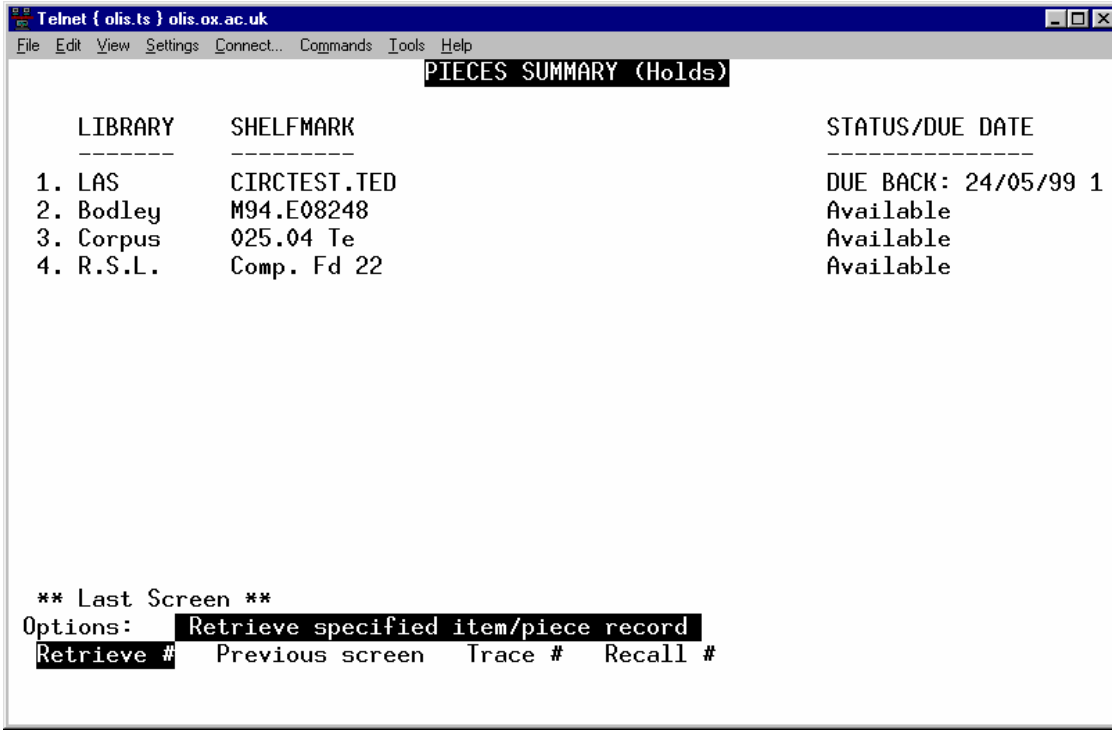

Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
PIECES SUMMARY (Holds)
LIBRARY SHELFMARK STATUS/DUE DATE
1. LAS CIRCTEST.TED DUE BACK: 24/05/99 1
2. Bodley M94.E08248 Available
3. Corpus 025.04 Te Available
4. R.S.L. Comp. Fd 22 Available
** Last Screen **
Options: Retrieve specified item/piece record
Retrieve # Previous screen Trace # Recall #

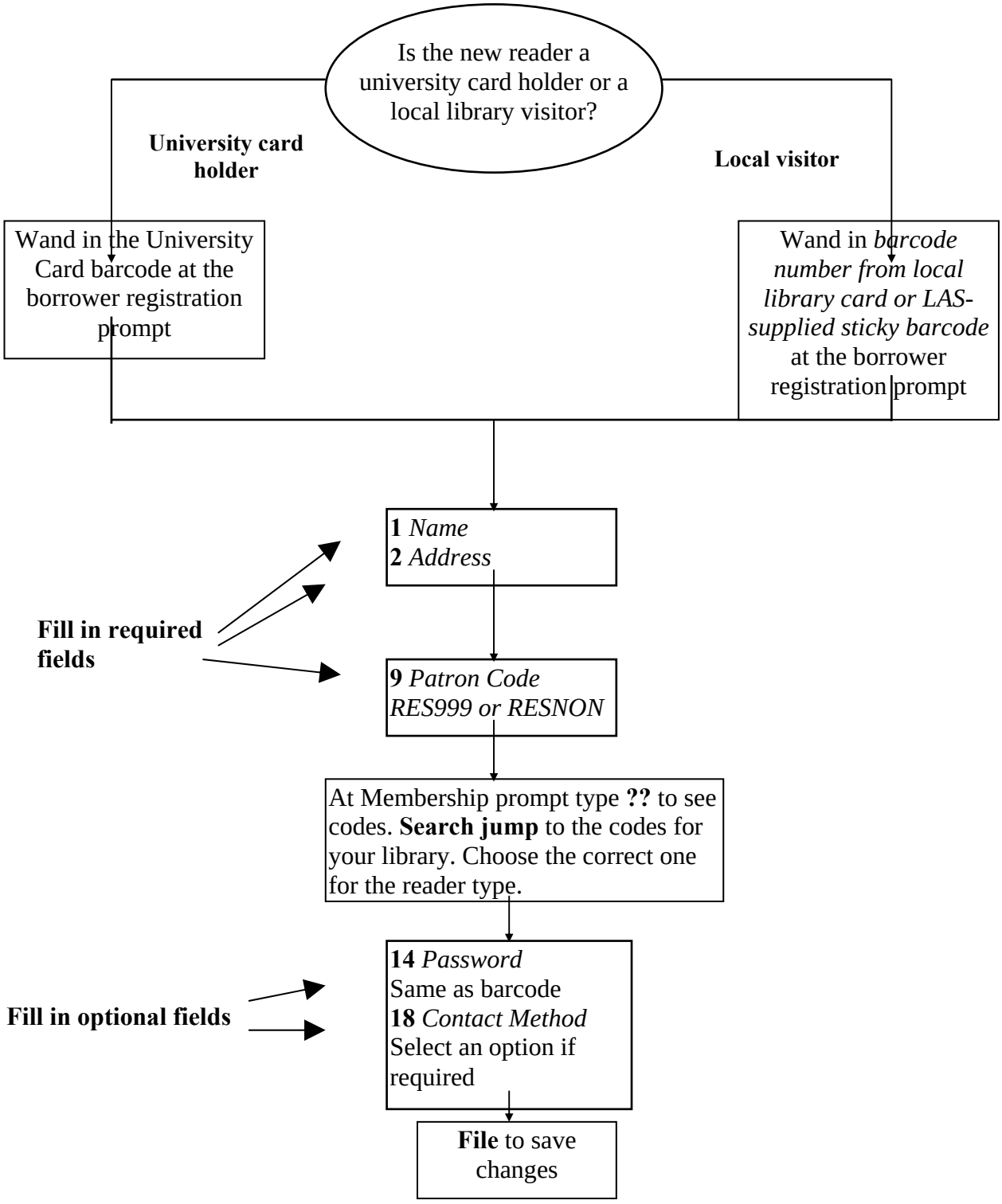
Fig. 7.20: Pieces Summary screen for indirect recall of items

Locate the item which you wish to recall, if necessary using the **Forward** option if there are further pieces listed on a second screen. Then select the **Recall #** option, type in the line number of the item, and press **<Return>**.

You will be taken back to the Hold Detail screen. Select the option **Commit reservation** and press **<Return>**. If successful, a copy hold and a recall will be placed on the item, and you will be returned to the Holds Processing screen. Press **<Return>** twice to return to a circulation menu.

Appendix A - Quick Guide to Borrower Registration

When you wish to give a reader borrowing permissions in your library, firstly look for them in the OLIS patron file (see 1.5-7). ***If*** you are sure that you cannot find them, create a registration for them manually. Use the following guidelines (further details may be found on 1.8-16):


Is the new reader a university card holder or a local library visitor?
University card holder
Local visitor
Wand in the University Card barcode at the borrower registration prompt
Wand in *barcode number from local library card or LAS-supplied sticky barcode* at the borrower registration prompt
1 *Name*
2 *Address*
Fill in required fields
9 *Patron Code*
RES999 or RESNON
At Membership prompt type **??** to see codes. **Search jump** to the codes for your library. Choose the correct one for the reader type.
14 *Password*
Same as barcode
18 *Contact Method*
Select an option if required
Fill in optional fields
File to save changes

Appendix B - CEHI

The keyword CEHI (option 5 on the main circulation menu for a desk ID) can be used

- For searching the OLIS catalogue
- For certain kinds of editing of your own libraries holdings

To access the function select the option for or type (in upper or lower case) **ceh** from any menu in the circulation module. The following prompt will appear:

```
Enter item barcode or search command :
```

At this prompt you may retrieve the item record in which you are interested, either by

- wanding in the item barcode (or typing in the item barcode and pressing <**Return**>), or
- using any available staff OPAC search command, e.g.

a=shakespeare, william
tw=gentlemen verona
i=0861878450

and pressing **<Return>**. Please see the OLIS OPAC staff pocket reference guides (available from LAS in leaflet form), or the OLIS OPAC reader pocket reference guides (in leaflet form or at http://www.lib.ox.ac.uk/olis/) for further searching techniques.

If your search is unsuccessful, please select the option for **Quit search** and press **<Return>** to go back to the "Enter item barcode or search command" prompt. If your search is successful, if desired you will be able to access an Item Display, either via a browse heading or title summary list (or both) or directly.

You may then select the **# item** option, type in the line number of a copy and press **<Return>** to *display only* the piece record for any given copy of the item held in any library. If your library has a copy of the item, you will be able to select a **Retrieve #** option, type in the line number of such a copy and press **<Return>**, and to make changes to the piece record.

If you wand in an item barcode at the "Enter item barcode or search command" prompt, or type in an item barcode and press **<Return>**, you will retrieve the piece record directly of the item with that barcode.

A screen similar to the following will appear:

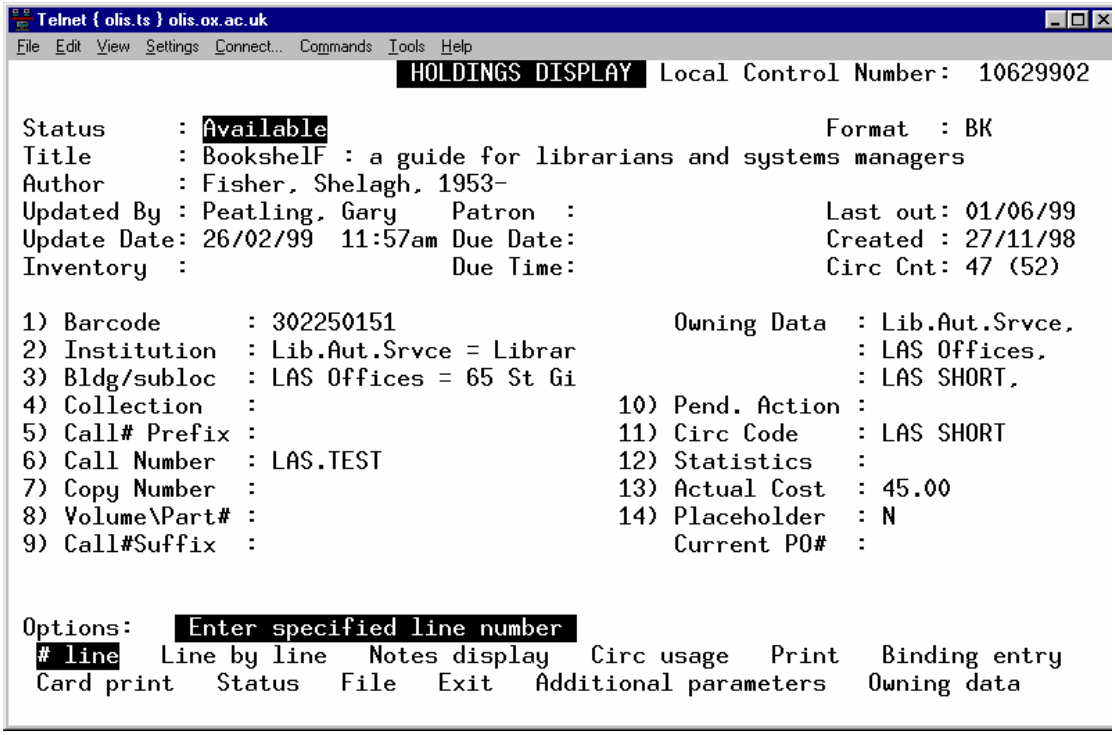

Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
HOLDINGS DISPLAY Local Control Number: 10629902
Status : Available Format : BK
Title : BookshelF : a guide for librarians and systems managers
Author : Fisher, Shelagh, 1953-
Updated By : Peatling, Gary Patron : Last out: 01/06/99
Update Date: 26/02/99 11:57am Due Date: Created : 27/11/98
Inventory : Due Time: Circ Cnt: 47 (52)
1) Barcode : 302250151 Owning Data : Lib.Aut.Srvce,
2) Institution : Lib.Aut.Srvce = Librar : LAS Offices,
3) Bldg/subloc : LAS Offices = 65 St Gi : LAS SHORT,
4) Collection :
5) Call# Prefix :
6) Call Number : LAS.TEST
7) Copy Number :
8) Volume\Part# :
9) Call#Suffix :
10) Pend. Action :
11) Circ Code : LAS SHORT
12) Statistics :
13) Actual Cost : 45.00
14) Placeholder : N
Current PO# :
Options: Enter specified line number
line Line by line Notes display Circ usage Print Binding entry
Card print Status File Exit Additional parameters Owning data

Fig. B.1: Holdings Display piece record screen viewed through CEH

From this screen you may wish to:
1, Edit some of the fields on the first screen. The following changes in particular may occasionally be applicable:

Changes to the item barcode. This may be necessary if an existing barcode has become unusable or is non-physical (i.e., system-assigned). Select the **# line** option, type **1** and press **<Return>**. Then wand in the new item barcode. The cursor will go back down to the option bar.

Changes to the call number (or shelfmark). Select the **# line** option, type **6** and press **<Return>**. Then type in the new shelfmark, and press **<Return>**. The cursor will go back down to the option bar.

Changes to the circulation code. This may be desirable if you wish to change the loan rules which are applied by OLIS when this particular item is checked out in circulation. Select the **# line** option, type **11** and press **<Return>**. You may then type **??** and press **<Return>** to display a list of the circulation codes which may be used for your library's items. We *strongly* recommend that you only use library specific circulation codes only (i.e., circulation codes beginning with your three-letter library code). Locate the circulation code you wish to use (if necessary selecting the **Forward** option and pressing **<Return>**), then type the line number and press **<Return>**. The selected circulation code will appear in field 11 of the piece record, and the cursor will go back down to the option bar.

To save any such changes to the piece record, select the **File** option and press **<Return>**. The following prompt may then appear:

Update owning info from current info (Y/N) ? :

It is especially advisable to type **y** and press **<Return>** in response to this prompt in order to make any changes that you have made to the item's circulation code effective.

A *Pieces Summary* screen of all OLIS copies of the item will be displayed:

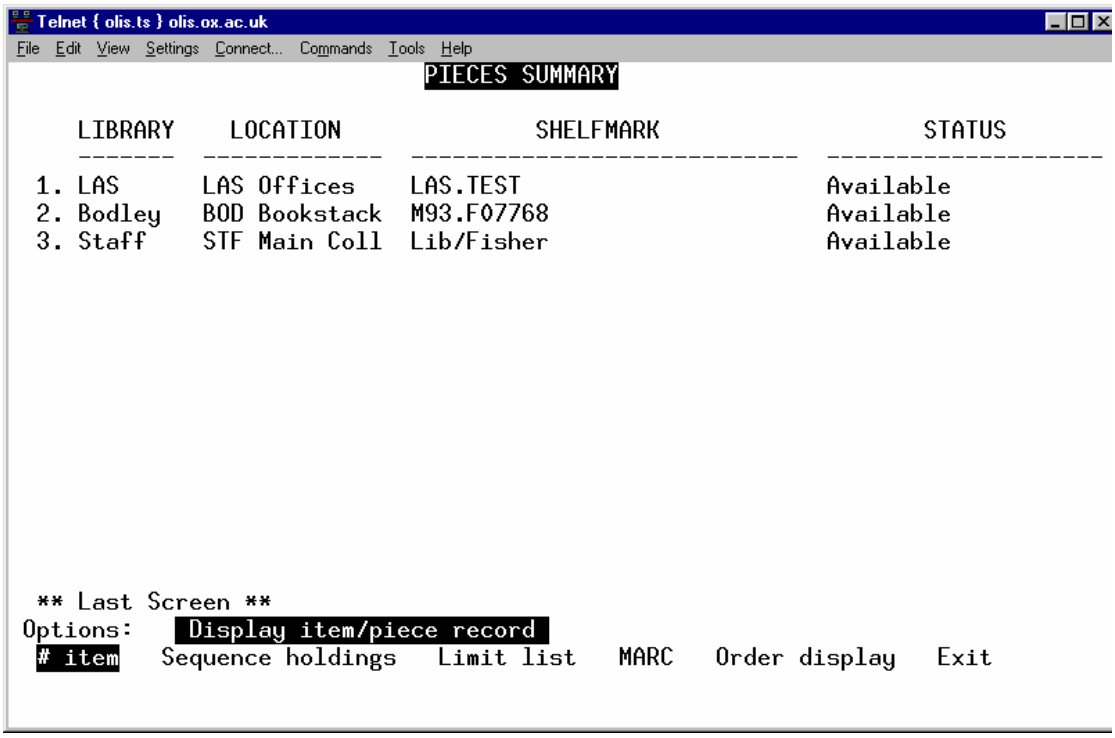

Telnet { olis.ts } olis.ox.ac.uk
File Edit View Settings Connect... Commands Tools Help
PIECES SUMMARY
LIBRARY LOCATION SHELFMARK STATUS
1. LAS LAS Offices LAS.TEST Available
2. Bodley BOD Bookstack M93.F07768 Available
3. Staff STF Main Coll Lib/Fisher Available
** Last Screen **
Options: Display item/piece record
item Sequence holdings Limit list MARC Order display Exit

Fig. B.2: Pieces Summary screen

Select **Exit** and press **<Return>** once more to go back to the "Enter item barcode or search command" prompt.

2, Change the item Status. Select the **Status** option and press **<Return>**. The following prompt will then appear:

Enter new Item status code :

Type **??** and press **<Return>** to see the list of available status codes. Locate the status code you wish to use (if necessary by selecting the line number and pressing **<Return>**. The following prompt will then appear:

File this status ? Y/N

Depending on the change you have made, the prompt:

Enter STATUS code to delete. (* = Current STATUS) :

may then appear. Type an asterisk (*****) and press **<Return>** to complete the status change.

Select **Exit** and press **<Return>** to display the *Pieces Summary* of all OLIS copies of the item. Then select **Exit** and press **<Return>** once more to go back to the "Enter item barcode or search command" prompt.

3, Add, alter or delete copy notes: Select the **Notes display** option and press <**Return**>. You may then:
Insert a new note. Select the **Insert after #** option, type in the line number of the note after which you wish to insert a new note (type 0 if there are no current copy notes) and press **<Return>**. Then add your new note.
Edit an existing note. Select the **# line,** type in the line number of the note you wish to edit and press **<Return>**. Then make any changes to the note.
Delete an existing note. Select the **Delete #,** type in the line number of the note you wish to delete and press **<Return>**.

Select the **Accept** option and press **<Return>** to save any changes you make in this **Notes** screen.

Appendix C - Summary of Functions at Check out

The following commands and functions can be used from the checkout item prompt (see 4.3-13).
[Commands can be entered in ***upper or lower case***.]

Function	**Command and press <Return>**
Checkout an item	**item barcode**[1]
Continue checkout function for another patron.	**A different patron barcode**[1]
Search the OPAC and retrieve an item from the catalogue	**S**
Change the issue date/time *for the next transaction only*[2]	**CD**
Change the due date/time *for the next transaction only*[2]	**DUE**
Display all the items checked out by this patron	**IT** or **LIST**
Issue or review holds (reservations) for the patron	**H**
Display all patron transactions (e.g. loans, fines, blocks)	**B** or **BL**
Display/edit the patron's record.	**P**
Go to the Checkin screen	**IN**
Enter a checkout note for the last item checked out.	**N**
Go to the Accounts Receivable screen	**AP**
Go back to the checkout borrower prompt	Press <**Return**> once
Go back to a circulation menu	Press <**Return**> twice

Notes:
1, If the item (or patron) barcode is wanded in, it is not necessary then to press <**Return**>.

2, The issue of due date/time can be changed for the entire checkout session by entering the same command (i.e., respectively **CD** or **DUE** at the checkout borrower prompt, instead of the checkout item prompt).

Appendix D - Summary of Functions at Check in

The following commands and functions can be used from the checkin item prompt (see 5.3-13).

NB: Commands can be entered in ***upper or lower case***.

Function	**Command and press <Return>**
Check in an item	**item barcode**[1]
Access checkout with the last reader for whom an item was checked in retrieved[2]	**OUT**
Search the OPAC and retrieve an item from the catalogue	**S**
Access brief details of any items awaiting collection for the reader	**IH**
Change the checkin date/time for all items to be processed.	**CD** or **BDT**
Activate the simple display of each item checked in. Entering this command again within the same checkout session will restore the display to detailed.	**D** or **DT**
Clear the fine "Amount" to blank.	**R**
Change "Charging Fines" from Yes to No or from No to Yes.	**F**
Register full or part payment of total outstanding charges	**PAY**
Waive total outstanding charges in full or in part	**WAIVE**
Go to the Accounts Receivable screen	**AP**
Exit checkin - go back to a circulation menu	Press **<Return>**

Notes:
1, If the item barcode is wanded in, it is not necessary then to press **<Return>**.

2, From here it is possible to access the reader's item list (from where it is possible to renew their existing loans) and patron record.

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